Rio 5.0 User Guide
for Store Users

January 12, 2016

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Introduction

Rio is the name of a suite of Web applications used in Apple Retail Stores to track ISU, Demo, IS&T, and other equipment used in stores. It includes:

- Rio and Rio Mobile, desktop and mobile applications for adding and tracking assets and for EasyTrack device administration;
- EasyTrack Desktop and EasyTrack Mobile, for tracking Isaac devices and other shared resources;
- Retail Labeler, a desktop application for printing price and asset labels; and
- Store Directory, a desktop application for viewing Apple Retail Store information.

This document describes how to use Rio for Specialists, BOH Specialists, Inventory Specialists, P&O Specialists, IS&T Champions, Managers, and other users in Apple Retail Stores.

See "*Terminology*" for definitions of terms used in this guide.

How to log in and log out

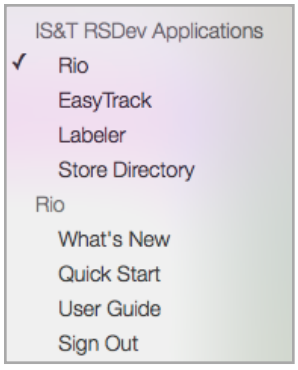
How to log in or switch to Rio

You access Rio with Safari. There are two ways to log in.

- If you are logged into an IS&T Retail Systems application other than Rio, click the user name in the title bar and select **Rio** in the drop-down menu.
- Go to https://rio.corp.apple.com in Safari to open an AppleConnect *sign-in* page. Specify your login credentials and click **Sign In** or press `return` to be taken to the opening view.

How to log out, switch to another application, or get help

1. Click the user name in the title bar to open this menu.
2. Click **Sign Out**, the name of an application you want to switch to, **What's New** to see recent changes, **Quick Start** to see brief summaries of the procedures described in this guide, or **User Guide** to see this guide.

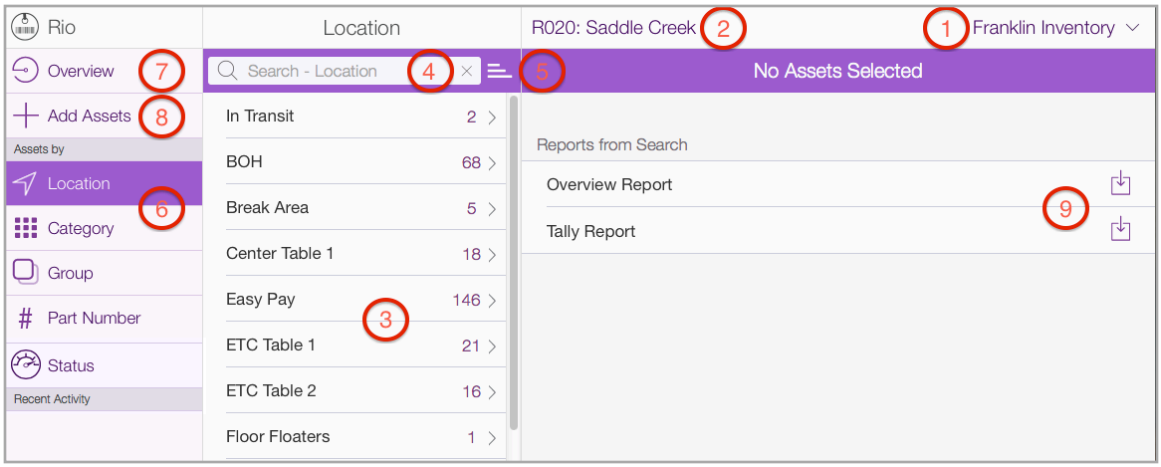


Note: The following data is discarded without warning when you exit Rio:

- Assets in the Add Queue.
- Assets in the Batch Queue.

Assets by views

This is the first view you see when you log into Rio. It shows all locations in inventory assigned to assets. The header and sidebar are common to all views.



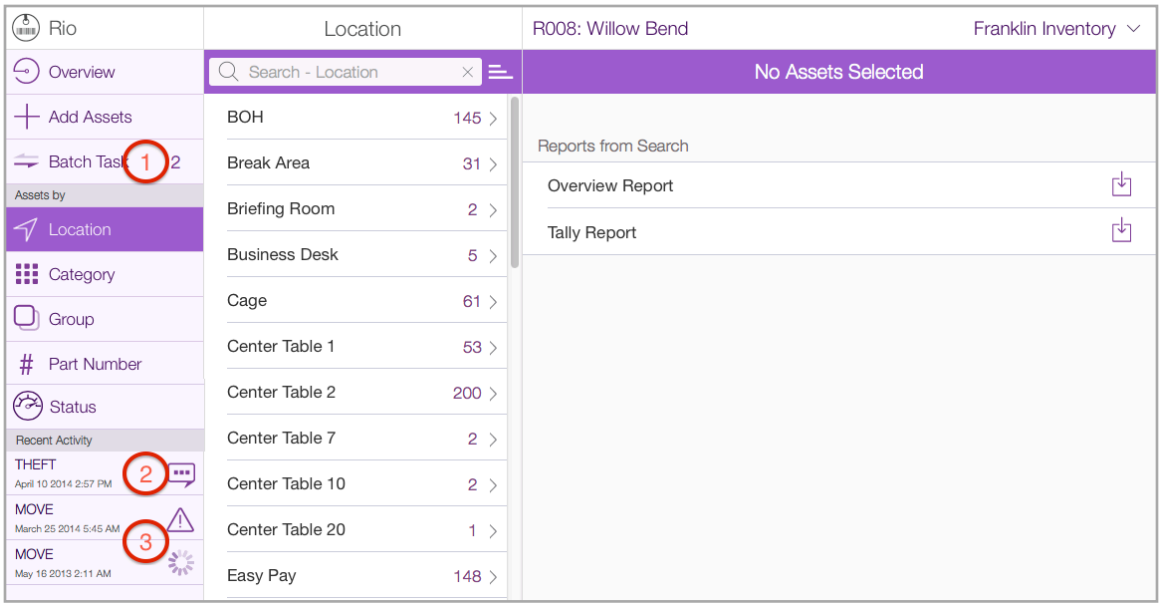
The *Assets by* views display all assets you are authorized to see, organized according to your selection in the *Assets by* section in the sidebar. Click **Location**, **Category**, **Group**, **Part Number**, or **Status** in the sidebar to list the relevant sets in the second column (called the *asset list*).

For example, click **Location** to list locations to which assets are currently assigned. Each location shows the number of assets assigned to it. Unassigned *Locations* are not listed.

To list the assets in a particular location, click its name in the asset list. Each *asset card* displays the asset's properties and status. See "*How to display and select assets*" for more information.

1. Click the user name to sign out, switch to a different IS&T Retail Systems application, or get help.
2. The store number field shows the current site.
3. The asset list contains the locations, categories, groups, part numbers, or statuses currently associated with assets, depending on whether **Location**, **Category**, **Group**, **Part Number**, or **Status** is selected in the sidebar. Each entry shows the number of assets in the set that match the current search term and Asset Filter, if any. Click any entry to see the assets in that set.
4. Enter a term in the *Search field* to only show assets whose attributes match the search term. You can use this in conjunction with the Asset Filter.
5. Click the Asset Filter icon and select a bucket in the drop-down menu to only show assets in that bucket. You can use this in conjunction with Search.
6. Click **Location**, **Category**, **Group**, or **Part Number** in the sidebar to organize assets by the corresponding attribute, or click **Status** to organize assets by their status, as described in "*How to display and select assets*".
7. Click **Overview** to see counts of assets in inventory and generate reports.
8. Click **Add Assets** to add one or more assets to Rio.
9. When *Location*, *Category*, *Group*, *Part Number*, or *Status* is selected in the sidebar, click **Overview Report** or **Tally Report** to generate a report that's filtered by the contents of the *Search* field and Asset Filter. (The Overview Report and Tally Report, which you generate from the *Overview* view, are unfiltered.)

Rio may add objects to the sidebar as you work:



1. **Batch Task** - Rio displays this if you have assets in your Batch Queue; click it to display the queue. The *Batch Task* object shows the number of assets in your queue, and is removed when you initiate a transaction for all of them or clear the queue. The Batch Queue is transparent to other users. Its contents are discarded if you exit Rio.

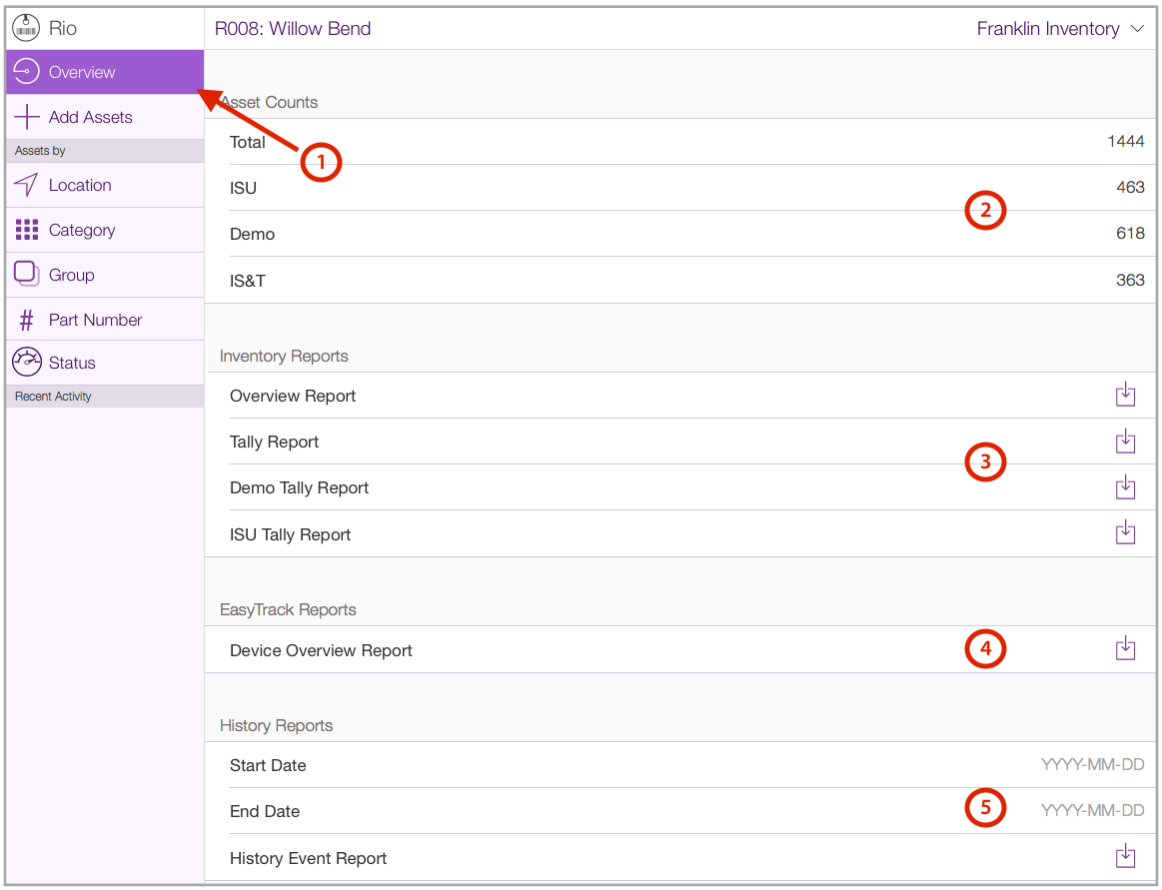
2. **Theft** - Rio displays this if any user reports theft of an SAPR asset; click it to see the Theft Report and the asset. If more than one theft is reported, there is a separate *Theft* object for each one. A *Theft* object can be seen by all users, and persists until the Theft Report is processed by RFL or cancelled.

3. **Rio Transaction** object - One of these is displayed whenever an *SAPR transaction* is in progress, or when a transaction fails and needs attention, as described in "*Rio's interactions with SAPR.*"

   The object shows the type of transaction, the date and time it was initiated, and a status icon. The two *MOVE* objects in the figure above are examples; the first is for a *Move Asset* transaction that failed, and the second is for a *Move Asset* transaction that's still in progress. Click an object to see the details.

   Rio Transaction objects are seen by all users; any user can see the details or retry a failed transaction (if it can be retried and the user has the necessary privileges). If more than one SAPR transaction is being processed or has failed, there is a separate object for each one.

How to see an overview and generate unfiltered reports

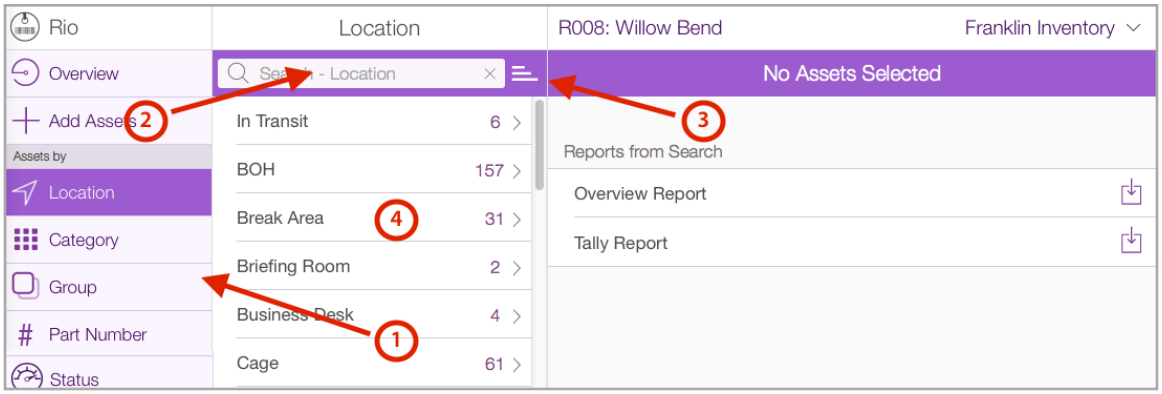


1. Click **Overview**.
2. The *Asset Counts* section shows the total number of assets in Rio's inventory and in each bucket. These counts are unaffected by the *Search* field and Asset Filter.
3. Click the selector for any report in the *Inventory Reports* section to generate the associated report. These reports are unaffected by the *Search* field and Asset Filter.
4. Click the **Device Overview Report** selector to generate a report showing the status of all EasyTrack devices. This report is unaffected by the *Search* field and Asset Filter.
5. Set **Start Date** and **End Date** and click the **History Event Report** selector to generate a report of all asset transactions in the specified date range.

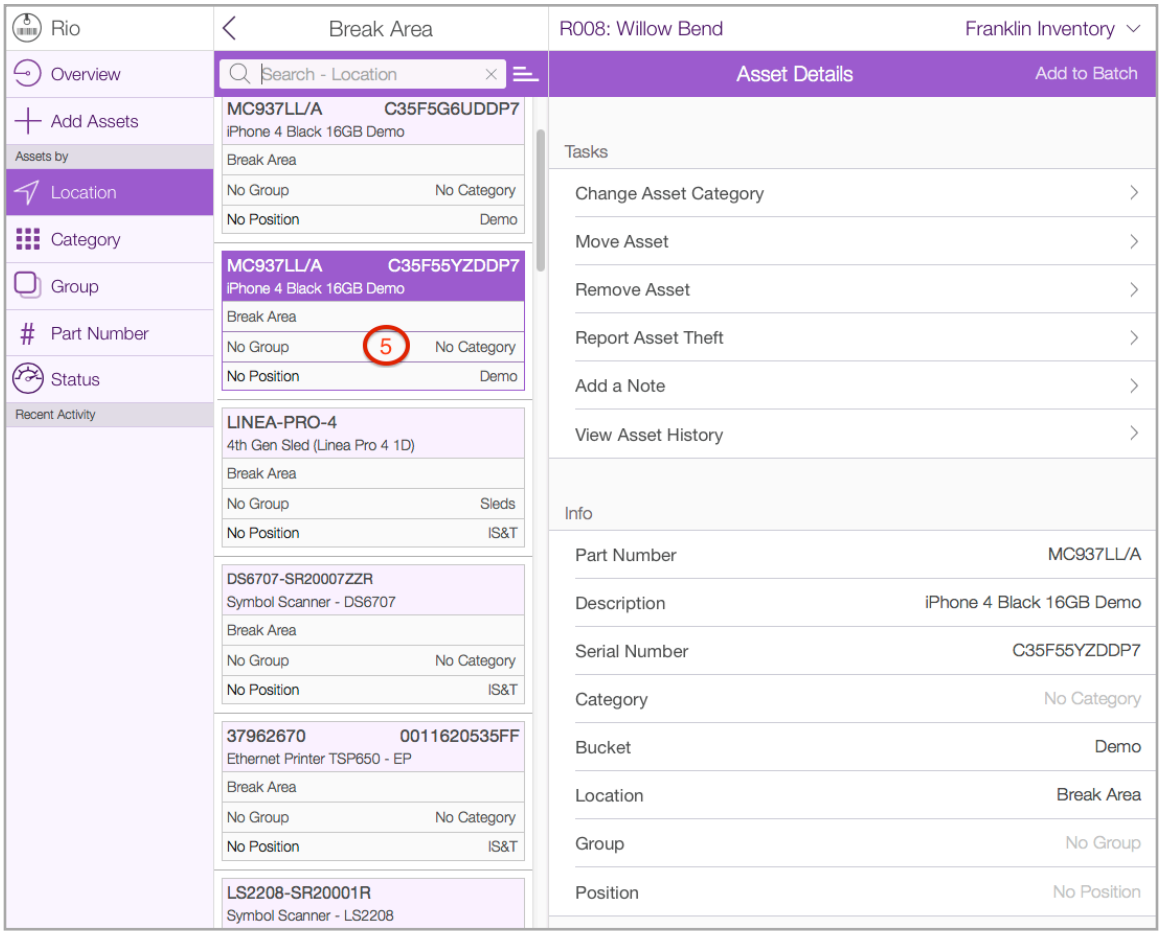
   Note: All reports are in CSV format and output to the default Downloads folder.

See "*How to generate unfiltered inventory reports*" for more information about reports generated from this view, and see "*How to generate filtered inventory reports*" for information about reports that only include assets that match the current *Search* field and Asset Filter settings.

How to display and select assets

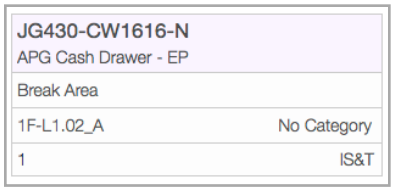


1. Click an entry in the *Assets by* section in the sidebar to organize assets by your selection.
2. Use Search to only show assets that match the search term.
3. Click the *Asset Filter* icon to only show assets in a particular bucket.
4. Click a specific location, category, group, part number, or status to display assets in that set. For example, in the figure above, click **Break Area** to display assets assigned to *Break Area*, as shown below.

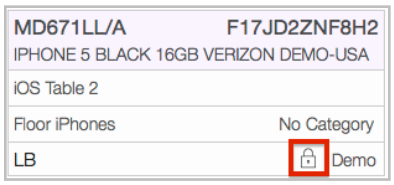


5. Select a single asset card to see tasks you can choose and information about the asset. In the asset card:

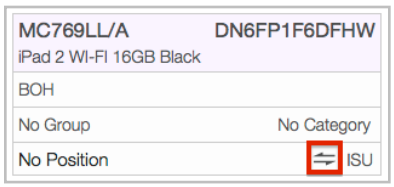
- The title contains a part number, description and, if the asset is serialized, its serial number.
- The body of the asset card contains the location, group and category, and position and bucket (in that order). If there is an exception, a status line is added to the bottom.
- If a category is not assigned to an asset, the format of its asset card is as shown here. The position line may also have *Queued*, *Locked*, and/or other icons when relevant, as shown shortly.



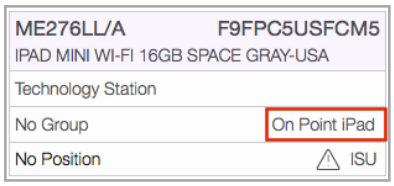
- If an asset is locked because there is an open Theft Report for it (see "*How to report theft of an SAPR asset*"), it is referenced by an active SAPR transaction (see "*How to update SAPR assets*"), or it is referenced by a failed transaction that needs attention (see "*How to handle failed SAPR transactions*"), its asset card has a *Locked* icon.



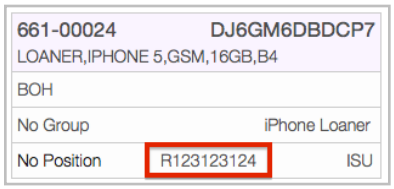
- If the asset is in your Batch Queue, its asset card has a *Queued* icon.



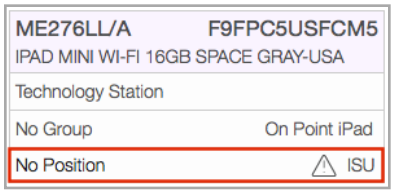
- If a category is assigned to the asset, it is displayed on the right side of the group line.



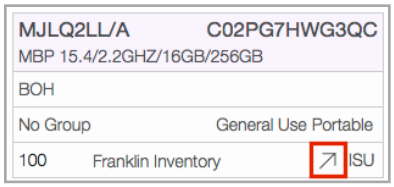
- If the asset is an iPhone Loaner device that has been lent to a customer, the bottom line shows the associated Repair ID.



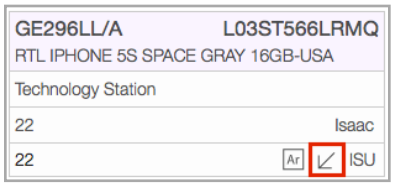
- If the asset is in an EasyTrack category:
  - The asset's position is occupied by its EasyTrack Number; the name of the user who checked out the device (if it is checked out); an *EasyTrack* status, *Argon-enabled*, and/or *Paired* icons (when relevant); and the bucket. This is the asset card for an asset registered with EasyTrack that has no EasyTrack Number.



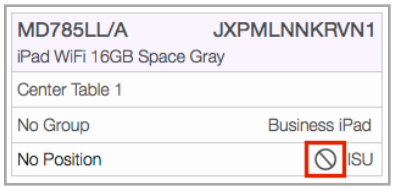
  - If an asset has been checked out and is not disabled, its asset card has a *Checked-Out* icon. The name of the user who checked it out is in the bottom line.



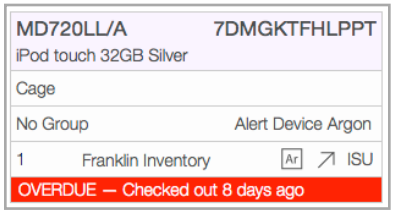
- If an asset has been checked in and is not disabled, its asset card has a *Checked-In* icon. (Use the *View EasyTrack History* task to see who last checked it in.)



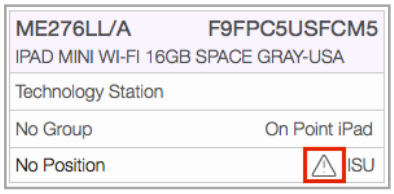
- If an asset is disabled, its asset card has a *Disabled* icon (regardless of whether it is checked out or checked in).



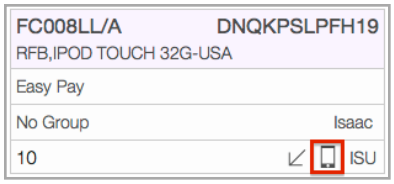
- If the asset has been checked out for more than 9 hours, an *OVERDUE* status line shows how long it has been checked out.



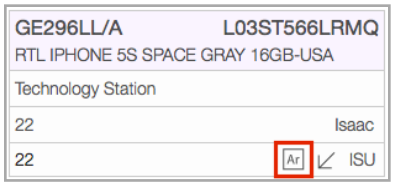
- If an EasyTrack category is assigned to an asset, but it has no EasyTrack Number, its asset card has a *Caution* icon.



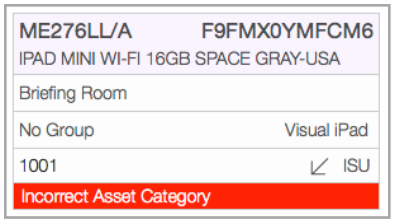
- If an asset is an Isaac iPhone or iPod that is paired with a sled, or is a sled that is paired with an iPhone or iPod, its asset card has a *Paired* icon.



- If an Argon-enabled category is assigned to an asset and an EasyTrack Number is assigned, its asset card has an *Argon-enabled* icon.

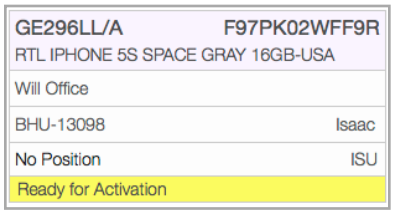


- If an asset is assigned to a deprecated category, its asset card has *Incorrect Asset Category* status. Use the *Change Asset Category* task to update the category.



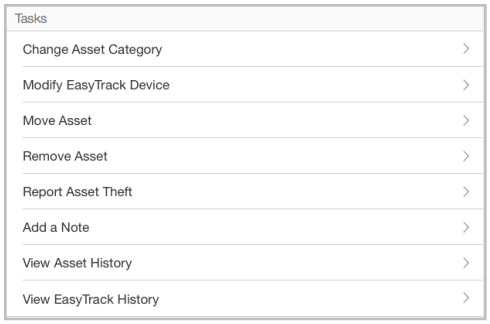
- If an asset is in the *In Transit* location, or is assigned to a deprecated location, its asset card has *Incorrect Asset Location* status. Use the *Move Asset* task to assign a new location.

- If the asset is an Isaac iPhone that has not been activated, the status line shows that iOS activation still needs to be completed.



In the *Asset Details* form:

- The *Tasks* section lists tasks available for the selected asset or assets. The tasks depend on which and how many assets are selected, your user role, and other factors. You can use any task listed. Click a task to open a form for collecting data and initiating it.

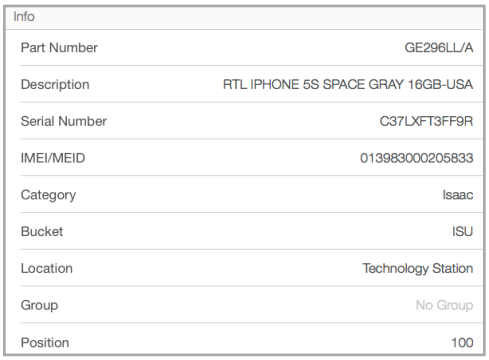


- The *EasyTrack* section shows the EasyTrack status for the selected asset. Its contents depend on the type of device selected and its EasyTrack status. This section is only present if you are an EasyTrack Admin[1], a single asset is selected, and the asset is in an EasyTrack category.

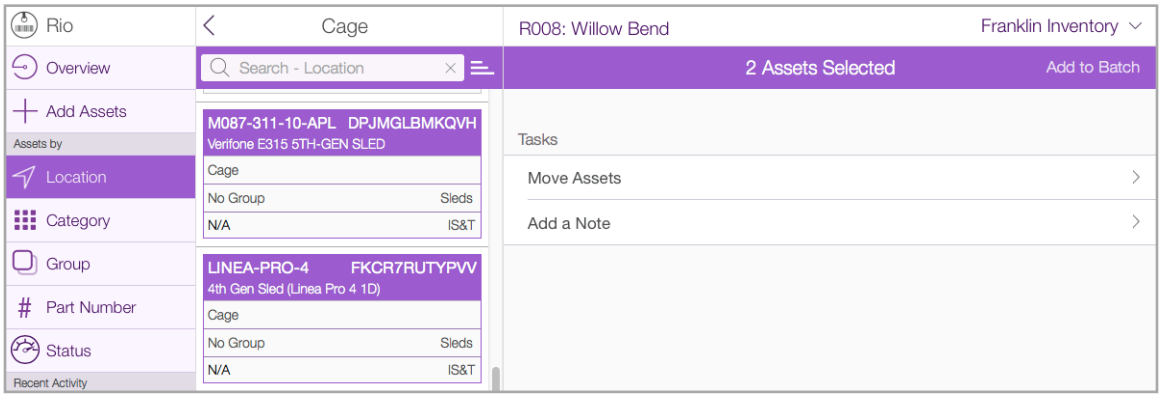
  - *Status* shows whether the device is disabled, checked in, or checked out.
  - *Who* (not shown here) is only present if the device is checked out, and shows who checked it out.
  - *When* shows how long ago the device was last checked out or checked in.
  - *Sled*, *iPod*, or *iPhone* is only present for paired Isaac devices, and shows the serial number and part number of the paired device.
- The *Joint Venture Loaner* section shows the *Joint Venture Loaner* state and associated Repair ID, if any. This section is only present when a single asset, which is registered with Joint Venture, is selected.

1 Only P&O Specialists and IS&T Champions with *Provision* privilege have *EasyTrack Admin* privilege. Users with this privilege are allowed to use the EasyTrack Admin tasks and features described in "*EasyTrack Administration.*"

- The *Info* section displays information that replicates information in the asset card, but in a more readable format. The IMEI/MEID and ICCID are also displayed, if they exist. The *Info* section is only present when a single asset is selected.



6. If you select multiple asset cards, the only tasks listed are ones that can be used with multiple assets, and no asset-specific information is displayed.



To select multiple assets, place the cursor in the asset list and then:

- Shift-click to select a range of assets.
- Command-click to select assets at random.
- Press `command-a` to select all assets.

How to filter assets

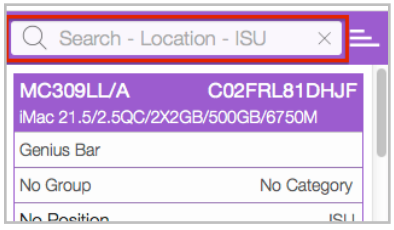
There are two ways to filter your asset list:

- Enter a search term in the *Search* field.
- Use the Asset Filter to filter the assets by bucket.

You can use any combination of the two, in any order, at any time.

How to use the Search field

Scan, type, or paste a search term in the *Search* field to only show assets whose attributes match your search term.



Note: The hint in the *Search* field (`Search - Location - ISU` in this example) reflects how your assets are organized (by *Location*) and the Asset Filter setting (*ISU*).

Search scans the following attributes:

Location	Part number	Category

Description	UPC	EasyTrack device owner
Group	Serial number	iRepair repair id
IMEI/MEID	ICCID	UDID

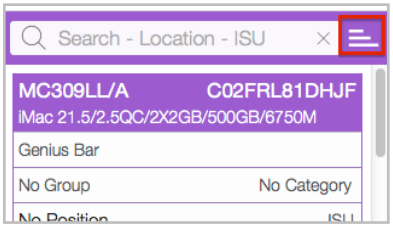
Enter two or more search terms, separated by spaces, to select only assets whose attributes match *all* terms. For example, enter `iphone verizon` to display only assets that have both *iPhone* and *Verizon* somewhere in their attributes.

Search is case-insensitive, the search term need not be complete, and can appear anywhere in an attribute. If you type text in the *Search* field, the asset list is refined as you type; continue typing to further limit your selections.

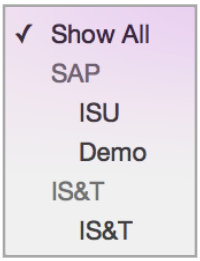
Click the *Clear* icon (**X**) in the *Search* field to clear it.

If you also set an Asset Filter, only assets whose attributes match all search terms and the Asset Filter are selected.

How to use the Asset Filter



Click the *Asset Filter* icon to open the Asset Filter menu.



- Select **Show All** to reset the filter.
- Select **ISU**, **Demo**, or **IS&T** to only display assets in the selected bucket.

How to add assets

There are two ways to add assets to your inventory:

- Have their data transferred from Rio in another site. (See "*How to transfer data for IS&T assets*.")
- Add the assets to Rio directly.

Adding assets directly is a two-step process:

1. Add the assets to the Add Queue.
2. Add all assets in the Add Queue to Rio.

Note: There is no relationship between the Add Queue and the Batch Queue.

The Add Queue contains one or more transaction items for assets you want to have the same starting category, bucket, location, group, and position assignments. You specify the part number, serial number, and other item-specific attributes for assets when you add them to the queue, and then add them as a batch to Rio. If the Add Queue contains SAPR assets, the associated count of assets is moved from Sellable to Demo or ISU in SAPR at the same time. If you add an *Isaac sled* to a store, it is automatically provisioned for use in the store as described

in "*Isaac sled provisioning*." The Add Queue can contain SAPR or IS&T assets, but not both, and can only contain assets in compatible categories.

Transaction items remain in the Add Queue until you clear the queue, delete individual entries, add them to Rio, or exit Rio. You can select other views and initiate other transactions while you are building it.

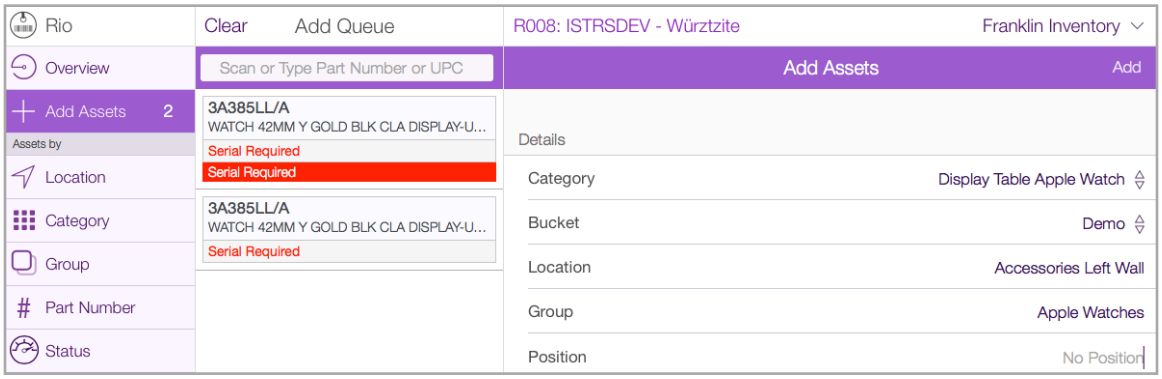
Your Add Queue is transparent to other users.

Notes: Only Inventory Specialists can add assets to stores.

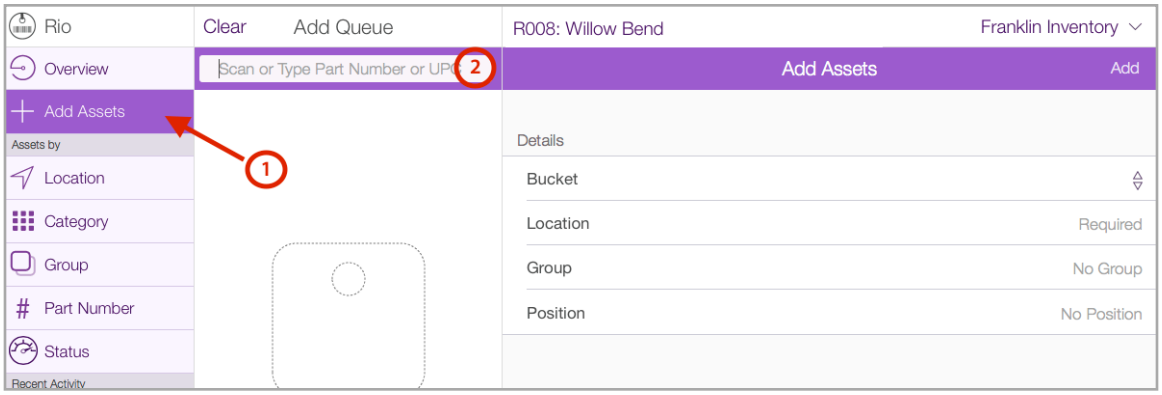
Important: If you are adding non-serialized assets and there is a Rio Transaction object for a failed Add transaction in the sidebar, make sure you are not repeating the earlier Add. If you are, either cancel the Add and retry the earlier one, or cancel the retry and finish the Add. If both are executed, article counts in SAPR and Rio will get out of sync with your inventory.

How to display assets in the Add Queue

Click **Add Assets** in the sidebar.

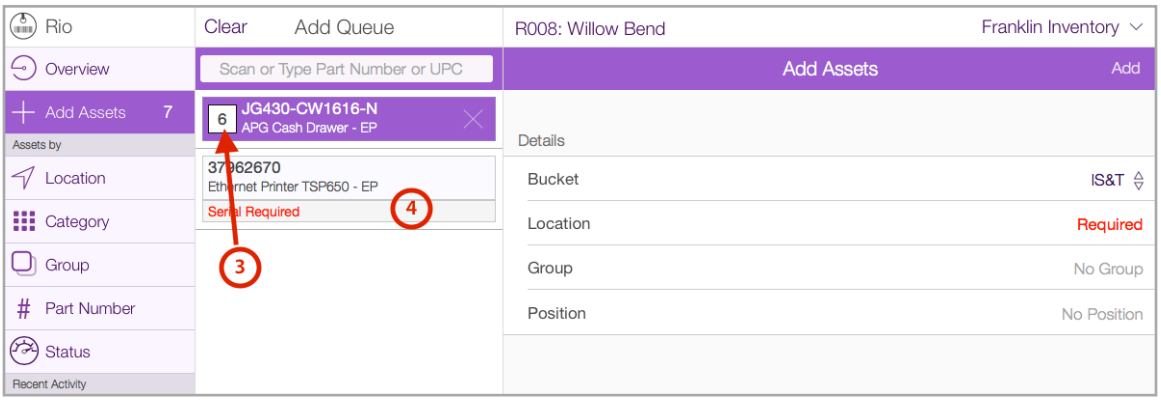


How to add assets to the Add Queue



1. Click **Add Assets**.
2. Scan, type, or paste a part number or UPC in the *Input* field. This adds a new transaction item to the Add Queue.

Note: You cannot enter both IS&T and SAPR part numbers, or part numbers that have conflicting category choices. (See "*About categories*" for more information about category assignments.)



3. If the asset is not serialized, the transaction item's title contains a count field. Optionally edit the count, or enter another asset with the same part number to increment it.

4. If the asset is serialized, the transaction item has fields for entering item-specific data. Scan, type, or paste the serial number in the *Serial Number* field.

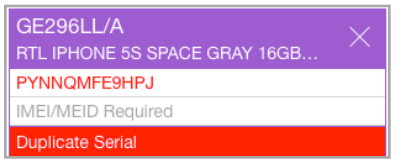
   Note: To help guard against data entry errors, Rio hides the serial number you enter and adds a *Confirm Serial* line to the transaction item. (This is only done for Apple serial numbers.) Enter the serial number again to confirm it.

5. Scan, type, or paste the IMEI/MEID and ICCID[2] as required (not shown above, but see examples below).

   Notes:

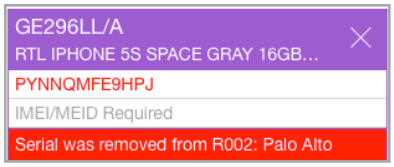
   1. Rio performs basic validation when you add assets to the Add Queue; if it detects an exception, it reports an error and does not allow you to add the asset. For example, you are not allowed to add an asset whose part number is not recognized.

      - If the serial number is already in your Add Queue or assigned to an asset at your store, the error is displayed like this. Verify the serial number is entered correctly. If so, either remove the duplicate, or contact HelpLine for assistance.



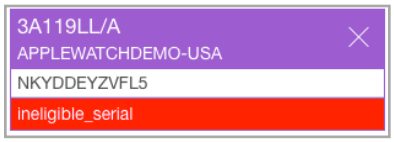
      - If the serial number is assigned to an asset at another site, the error is displayed like this. Verify the serial number is entered correctly. If so, contact HelpLine for assistance.

      - If the serial number is for an RTWed asset, the error is displayed like this. Verify the serial number is entered correctly. If so, contact HelpLine for assistance.

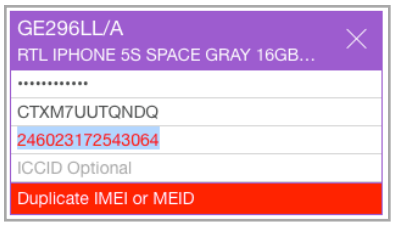


2 If the device has an ICCID, an *ICCID* field opens when you enter a valid value for *IMEI/MEID*.

- If the serial number for *an Apple Watch Demo* device has not been approved, Rio reports this error. Verify the part number and serial number are correct. If they are, contact HelpLine.



- If the IMEI or MEID is already in your Add Queue, the error is displayed like this. Verify the IMEI/MEID is entered correctly. If so, either remove the duplicate, or contact HelpLine for assistance.



2. For iPhones used as Isaac devices, it's important to enter the IMEI/MEID accurately. If the IMEI/MEID and serial number do not match according to manufacturer records, *Add Assets* will fail.

6. Repeat steps 2-5 as necessary to add more assets to the Add Queue. (Note that the *Add Assets* object in the sidebar shows how many assets are currently in the queue.)
7. Add the assets to the Rio database as described below.

While you are building the Add Queue, you can do any of the following:

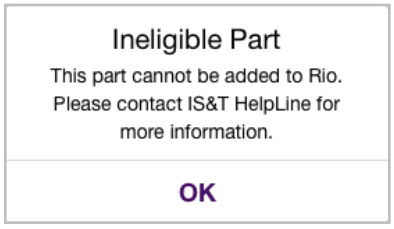
- Click **Add** to add the assets in the queue to Rio, and make corresponding bucket movements in SAPR, if applicable. Before clicking *Add*, set the category, location, group, and position as appropriate.
- Add more assets to the Add Queue as described above.
- Remove individual assets from the queue.
- Clear the Add Queue.
- Build a batch of assets in the Batch Queue and initiate a batch transaction.
- Click a *Rio Transaction* object to see details about it. While there, you can cancel the transaction or retry it if it is retriable, and you have adequate privileges.
- Initiate a task for one or more assets by clicking **Location**, **Category**, **Group**, **Part Number**, or **Status** in the sidebar, selecting one or more assets, and selecting a task.
- Display the *Overview view*.
- Generate reports.
- Report a stolen SAPR asset or cancel a Theft Report.

Here are some things you cannot do:

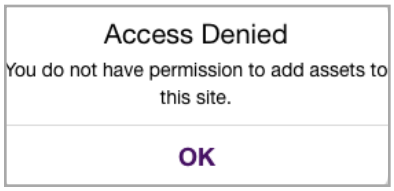
- Start building a new batch of assets to add until you complete or clear the one you are working on. (You only have one Add Queue.)

  Note: Since Add Queues are user-specific, multiple users can be building them at the same time.

- Add ineligible parts to the Add Queue. If Rio reports this error, verify the part number or UPC is entered correctly. If so, contact the IS&T HelpLine.

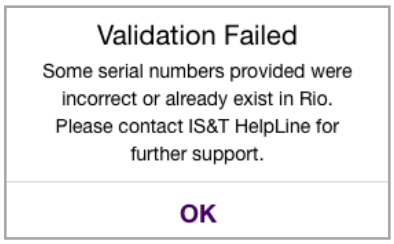


- Add SAPR parts to the Add Queue if you do not have SAPR access or permission to add assets. Rio reports this error if this is the case.



- Add devices whose categories are incompatible. If Rio reports this error, add the devices separately.

- Add a device whose serial number is already in Rio. This includes serial numbers of devices that were RTWed. If Rio reports this error, verify the serial number is entered correctly. If so, contact HelpLine for support.


Validation Failed
Some serial numbers provided were incorrect or already exist in Rio. Please contact IS&T HelpLine for further support.
OK

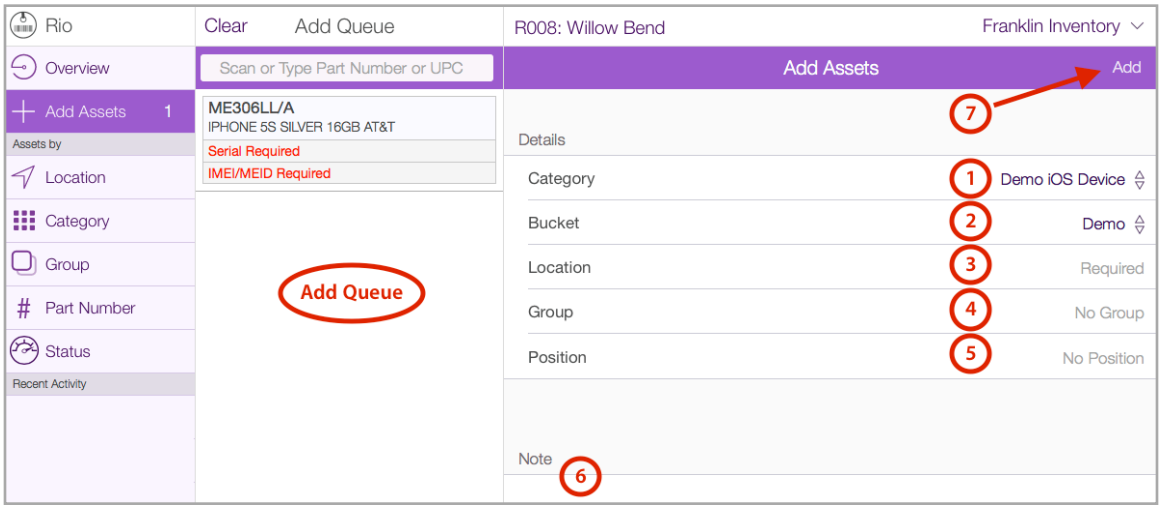
- Exit Rio without losing the contents of your Add Queue.

How to add assets in the Add Queue to Rio

When you finish adding assets to the Add Queue, the next step is to add them all to Rio.

Notes:

1. Wait to fill out the *Add Assets* form until you finish adding assets to the Add Queue. Your category options depend on which assets are in the queue. The bucket is chosen automatically based on the category.
2. Serial numbers of Apple Watch Demo devices must have already been approved. If not, the Add will fail.



1. A default category is selected based on part numbers of the assets in the Add Queue. If there are other choices, click the *Category* selector and select a value from the drop-down menu. *Category* is required for all SAPR assets.

   Depending on which assets are in the Add Queue, the category may be fixed. *Sleds* and *Apple Watch Demo* devices are examples. You can only select a category if it is not fixed. See "*About categories*" for more information about selection options.

   Note: Some articles can be assigned to a category in either *ISU* and *Demo*. For these articles, the bucket is fixed when you add the asset. After that, only categories in that bucket are available in *Change Asset Category*.

2. For SAPR assets, *Bucket* is selected automatically based on the category; for IS&T assets, Bucket is selected automatically based on the part number. In neither case can it be changed.

3. Click the *Location* field to open a menu of location names. Select an entry, or begin typing to narrow your choices. *Locations* that match your string are listed at the top, followed by the others. *Location* is required.

4. Click the *Group* field to open a menu of group names. Select an entry, or begin typing to narrow your choices. *Groups* that match your string are listed at the top, followed by the others. If no names match your string, the string you enter is used and added to the menu. *Group* is optional.

5. Type a 1-4 character alphanumeric value in the *Position* field. *Position* is optional, and is not present if *Category* is for EasyTrack devices.

   - *ISU* assets should follow a numerical convention matching, for instance, the logical position number or the last octet of the device's IP address.
   - *Demo* assets should follow the alpha pattern described by Visual Merchandising. For example, front positions are FA, FB, FC; rear positions are RA, RB, RC; and so on.

6. Enter an explanation in the *Note* field. The note is added to each asset in the batch. Note is optional.

Note: If you decide to add more assets to the Add Queue after entering information in the *Add Assets* form, update your category (if possible) when you finish adding them to the queue. If you attempt to add an asset whose eligible categories conflict with assets in the Add Queue, Rio reports an error and won't let you add it.

When you are ready to add the assets to Rio:

7. Click **Add** to add all assets in the Add Queue to Rio.

   If you are adding SAPR assets, Rio places a *Rio Transaction* object with a *Busy* icon like this in the sidebar while the transaction is active.

Note: After clicking *Add*, we recommend you not exit Rio until the transaction completes.

For SAPR assets, Rio moves the appropriate number of articles from Sellable to the appropriate bucket in SAPR, and only updates its own database if SAPR is updated successfully. It then removes the *Rio Transaction* object from the sidebar.

If you are adding an *Apple Watch Demo* device, Rio checks to see if its serial number is authorized. If so, Rio adds *Awaiting Enrollment* status to its asset card. This status remains until MDM notifies Rio that the device has finished enrolling. If the serial number is not authorized, Rio reports *Validation Failed* and adds appropriate status to the asset card. See the "*Apple Watch Demo device support*" section in the Rio User Guide for more information.

Note: A device cannot finish enrolling until it is turned on and activated. After this, it can take as long as 30 minutes for Rio to be notified. If *Awaiting Enrollment* status is displayed more than 30 minutes, check to see if the device is turned on, activated, and working properly. If it is, contact HelpLine.

Isaac sled provisioning

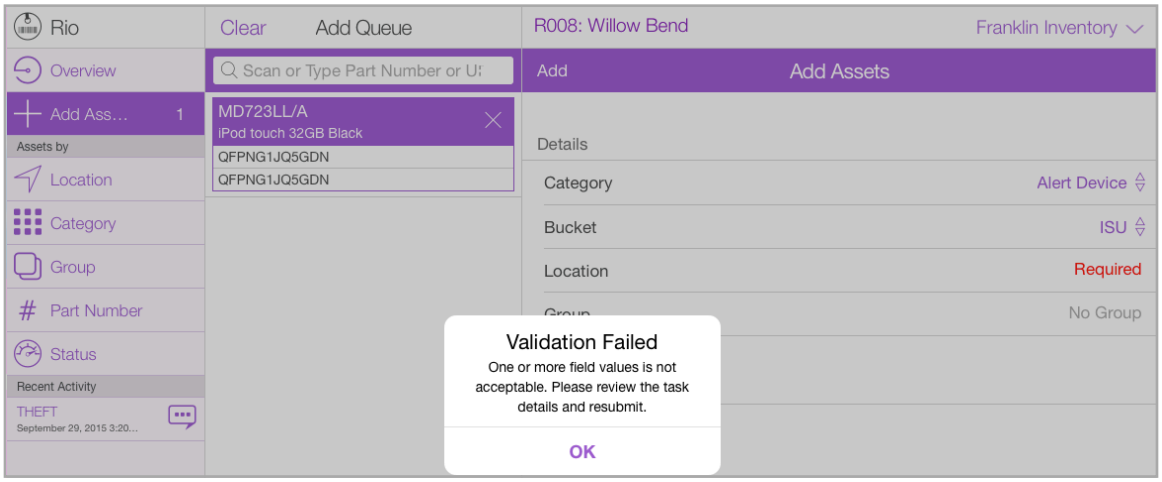
Rio automatically provisions Verifone and iSMP sleds for use by EasyPay in the store when they are added to a store, and when they are moved out of the *In Transit* location in a store. See "*Isaac sled provisioning*" for more information.

Add errors

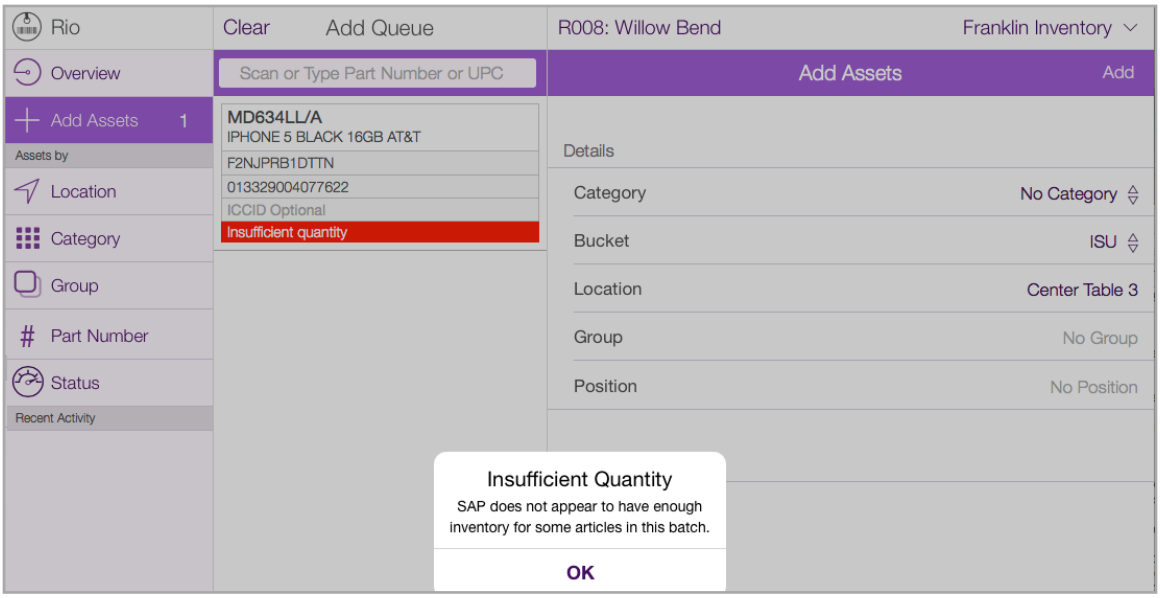
If Rio detects an error during validation, it reports it and returns to the *Add Assets* form without updating SAPR or the Rio database. Examples of validation errors include:

- Required data missing (for example, location or serial number).
- Part with same serial number already in Rio.
- Attempt made to add mix of sleds and other types of devices, or devices with incompatible categories.

A *Validation Failed* error indicates that one or more fields in a transaction item or the *Add Assets* form contains invalid data. The fields are displayed in red font and, if one or more transaction items contain errors, error status lines are added to all relevant items. Most errors are self-explanatory. If the error involves an invalid serial number or one that is already in Rio (perhaps in a different site) and the serial number was entered correctly, contact the HelpLine for assistance.



An *Insufficient Quantity* error is reported if you are adding assets with SAPR part numbers and SAPR has fewer uncommitted assets in Sellable than you are trying to add.

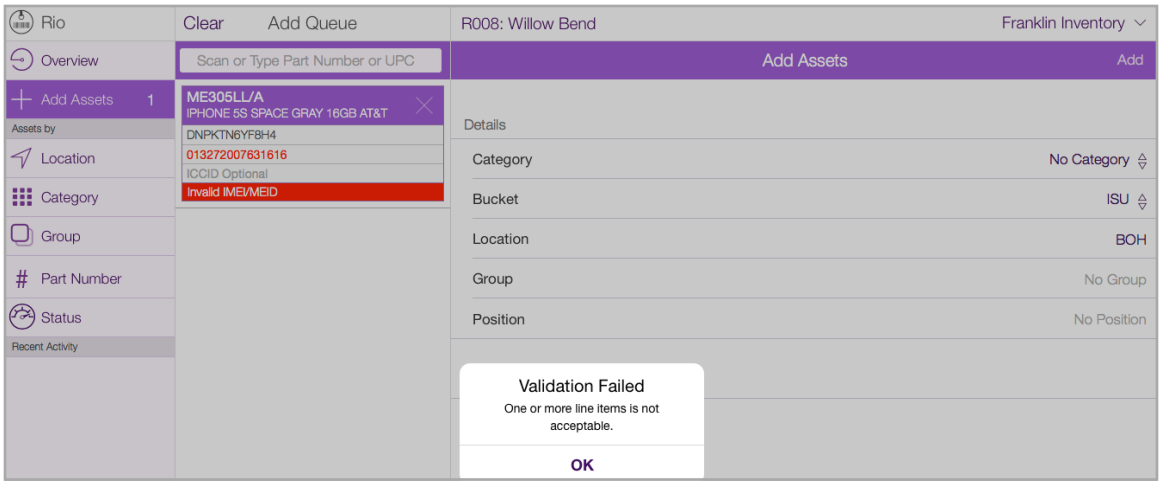


If Rio reports insufficient quantity, you have these options:

- Click **Cancel** to cancel the Add transaction and return to the *Add Assets* task form. From here, you can:
  - Remove individual transaction items from the Add Queue, and then click **Add** to retry.
  - Edit the quantity in the transaction item for an unserialized asset in the Add Queue, and then click **Add** to retry the transaction.
  - Click **Clear** to clear the Add Queue.
- Click **Continue** if you want to continue the Add transaction and drive Sellable inventory negative for this article. In this case, processing continues as if SAP has sufficient assets.

Important: **This error indicates the article count in SAP is not up to date. Click Continue only if you are sure there are unprocessed transactions in SAP that account for the inaccuracy. If this is not the case or you are unsure, determine whether the article counts in Sellable and Rio are accurate and, if not, take actions necessary to correct them.**

If you are adding an Isaac iPhone, Rio checks to see if the serial number and IMEI/MEID match according to information supplied by the manufacturer. If they don't match, Rio adds *Invalid IMEI/MEID* status to the transaction item. If you click **Add** despite the error, the Add attempt fails, as shown below.



If an Add transaction fails after successful validation, Rio replaces the *Busy* icon in the *Rio Transaction* object with a *Failure* icon as described in "*SAPR batch transaction failure actions*." The assets are not added to Rio and no bucket movements are done in SAPR.

How to remove assets from the Add Queue

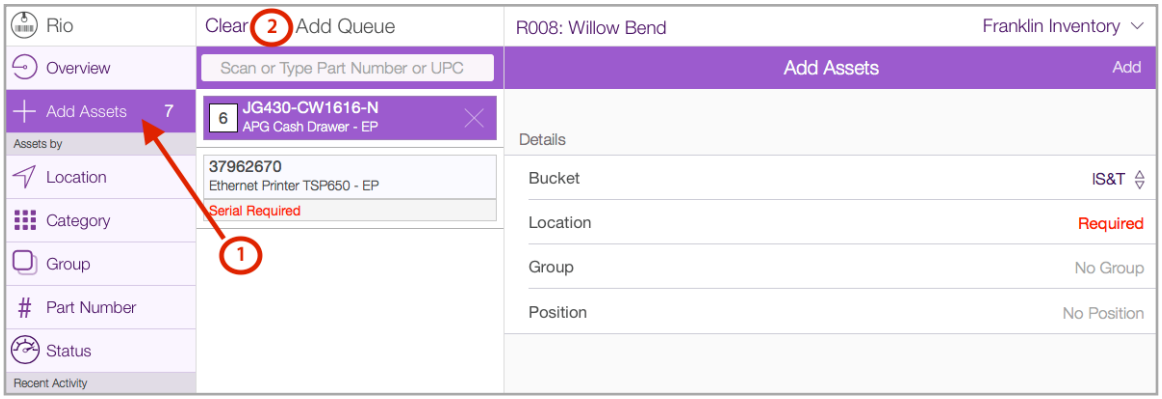
To remove an individual asset from the Add Queue:

1. Select the transaction item. This places a *Remove* icon (**X**) in it, as shown here.
2. Click the *Remove* icon.

Note: There is no confirmer.

To clear the Add Queue

To remove all entries from the Add Queue:



1. If necessary, click **Add Assets**.
2. Click **Clear**.

Note: There is no confirmer.

How to use the Batch Queue

Batch transactions are ones that involve, or can involve, two or more assets. There are two ways to specify the assets in a batch transaction:

1. Select them in an asset list as described in "*How to display and select assets*."
2. Build a list of assets to process in the Batch Queue.

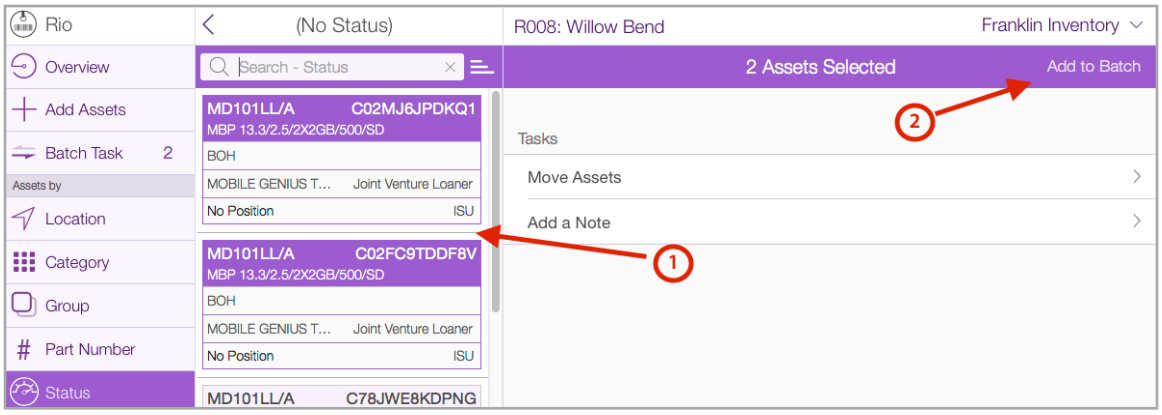
The Batch Queue is a mechanism for building a list of assets incrementally and then selecting a task to operate on them together. Only you can see your Batch Queue.

Using the Batch Queue is a two-step process:

1. Add assets to the queue.
2. Initiate a task to perform for all of them.

Note: There is no relationship between the Batch Queue and the Add Queue.

How to add assets to the Batch Queue



1. Select one or more assets.
2. Click **Add to Batch**.

   Notes:

   1. When you add the first assets to the Batch Queue, *Batch Task* is added to the sidebar showing how many assets are in the queue.
   2. If you select one or more asset cards when *Batch Task* is not selected in the sidebar, the *Tasks* section lists the tasks you can perform for the selected assets as described in "*How to execute a task*." For example, if you were to click **Move Assets** in the figure above, Rio would open a *Move Assets* form to update the selected assets, not the assets in the Batch Queue.

3. Repeat steps 1-2 as necessary to add more assets to the queue. While doing this, you can change your *Assets by* view, and use Search and/or the Asset Filter to help find them.
4. Initiate a task for assets in the queue as described in "*How to initiate a task for assets in the Batch Queue*."

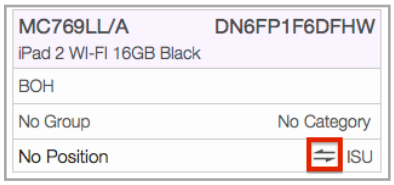
While the Batch Queue is open, you can:

- Initiate a batch transaction.
- Add more assets to the queue as described above.
- Remove individual assets from the queue.
- Clear the Batch Queue.
- View a failed SAPR transaction by clicking a *Rio Transaction* object in the sidebar. While there, you can cancel it as described in "*How to handle failed SAPR transactions*," but cannot retry it without losing the current contents of the Batch Queue.
- Add one or more assets to Rio.
- Initiate a task for one or more assets by clicking **Location**, **Category**, **Group**, **Part Number**, or **Status** in the sidebar, selecting the asset(s), and selecting the task.
- Display the *Overview view*.
- Generate reports.
- Report a stolen SAPR asset or cancel a Theft Report.

Here are some things you cannot do:

- Start building another batch in the Batch Queue. (You only have one Batch Queue.)
- Retry a failed transaction, which moves the transaction to the Batch Queue for reprocessing as described in "*How to handle failed SAPR transactions*," without losing the contents of the Batch Queue.
- Add, to the Batch Queue, assets that are locked because they are referenced by an active or failed transaction, or have an open Theft Report.
- Exit Rio without losing the contents of the Batch Queue.

When you display an asset in your Batch Queue, Rio shows it like this. (If you display an asset that is in someone else's Batch Queue, the asset card does not have a *Queued* icon.)



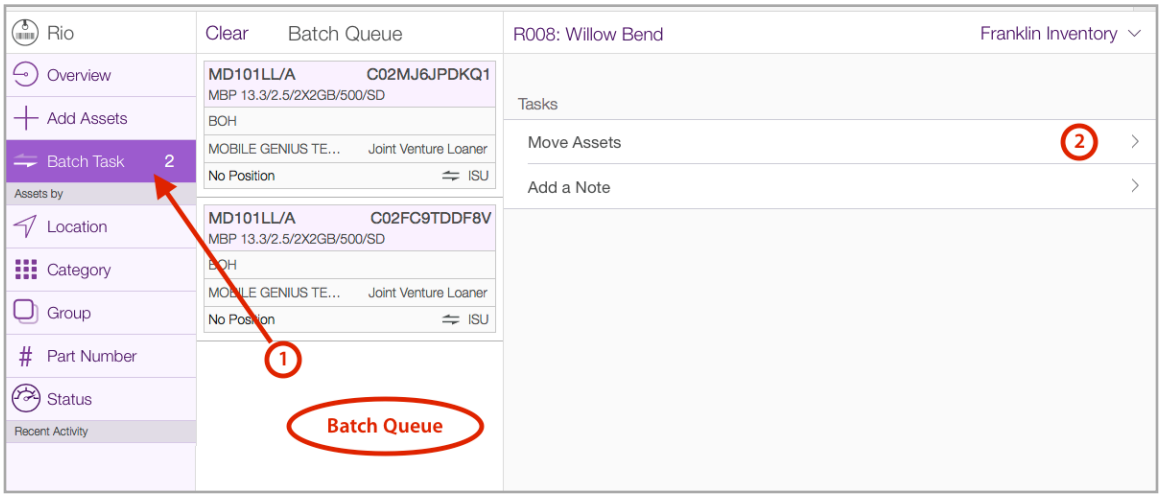
Assets in your Batch Queue are not locked and other users are unaware you are working with them. If other employees are using Rio, potentially any of your assets can be updated at any time. If this happens, you may see a *Locked* icon for the affected assets while the other transaction is in progress, but the assets are normally unlocked when processing completes. If another user transfers or removes an asset, it will disappear from your queue. If another user's transaction fails, the affected asset is locked until the issue is resolved or the transaction is cancelled.

How to display assets in the Batch Queue

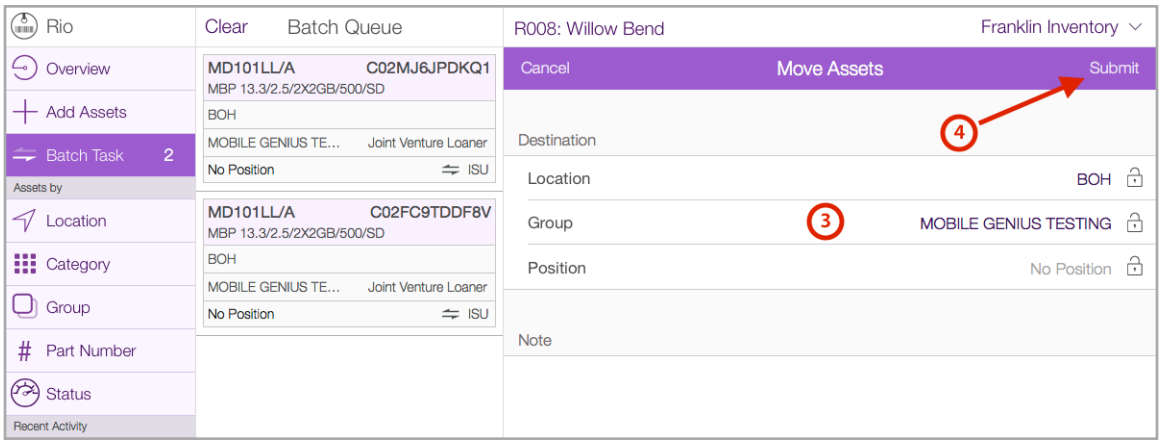
When you add an asset to an empty Batch Queue, Rio places a *Batch Task* object in the sidebar that shows the number of assets in the queue. The object remains in the sidebar until you execute a batch transaction, clear the queue, or exit Rio.

Click **Batch Task** at any time to display the contents of the queue.

How to initiate a task for assets in the Batch Queue



1. Click **Batch Task** to display the Batch Queue.
2. Select a task. The following figure shows the form if you select *Move Assets*.



3. Fill out the form.
4. Click **Submit**.

When you click **Submit**, Rio locks all assets in the queue and leaves them locked until it finishes the transaction. If it detects an exception during validation checking, Rio reports it, unlocks the assets, and suspends further processing. Assets in the Batch Queue are unchanged.

If the transaction passes validation checking, Rio clears the Batch Queue. At this point, you can start building a new Batch Queue, even before the transaction completes.

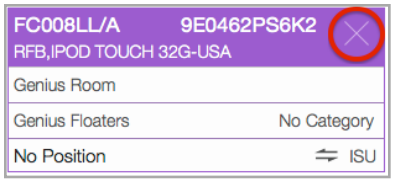
If the transaction involves SAPR assets, Rio adds a *Rio Transaction* object with a *Busy* icon to the sidebar. When processing completes, Rio changes the status icon to a *Success* icon for five seconds, then removes the object from the sidebar. If the transaction fails, Rio changes the icon to a *Failure* icon as described in "*SAPR batch transaction failure actions*."

When you add assets to the Batch Queue, they remain there until you clear the queue, delete individual entries, initiate a transaction to process them, or exit Rio.

How to remove assets from the Batch Queue

To remove an individual asset from the Batch Queue

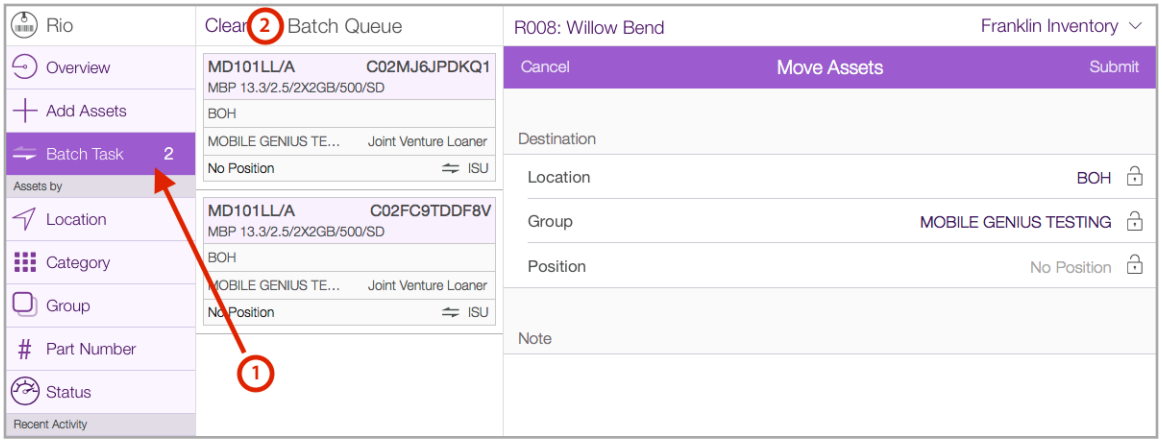
1. Select the asset card in the Batch Queue. This places a *Remove* icon (**X**) in it, as shown here.
2. Click the *Remove* icon.



Note: There is no confirmer.

To clear the Batch Queue

Clearing the Batch Queue deletes its contents and allows you to begin building a new batch.



1. If necessary, click **Batch Task**.
2. Click the **Clear** button.

This deletes both locked and unlocked assets in the queue, and removes *Batch Task* from the sidebar. There is no confirmer.

How to update SAPR assets

You update SAPR assets in the same ways as other assets.

Operations requiring SAPR Access

All transactions that change bucket counts in SAPR must be made through Rio, and require that you be authorized to access SAPR and SAPR to be available. This applies to the following Rio tasks:

- *Add Assets* - When you add SAPR assets to Demo or ISU in Rio, Rio moves the corresponding number of articles from Sellable to Demo or ISU in SAPR.
- *Remove Assets* - When you remove SAPR assets from Demo or ISU in Rio, Rio moves the corresponding number of articles to Sellable or RTW in SAPR, depending on information you provide.

Before updating SAPR asset data, Rio checks to see if SAPR has enough articles in the source bucket. If not, Rio reports an error.

If you are not authorized to access SAPR or SAPR is not available, you can only take actions for SAPR assets that do not involve bucket movements. If the necessary preconditions are met, you can do the following at any time, even if SAPR is unavailable or you do not have SAPR access privileges:

- Execute any transaction that does not involve SAPR assets.
- Change the location, category, group, and/or position of SAPR assets.
- Enable or disable EasyTrack assets, and assign new EasyTrack Numbers (EasyTrack Admins only).
- Register assets in ISU for Joint Venture, change their states, and unregister them.
- Report thefts of SAPR assets, and cancel Theft Reports.
- Add notes to SAPR assets.
- View Asset History for any SAPR asset.
- View EasyTrack History for any asset that is or has ever been registered for EasyTrack.
- Generate *Overview*, *Tally*, and *History* reports.
- Generate *EasyTrack Overview* and *Device Usage* reports.

Rio's interactions with SAPR

When you execute any task:

1. Rio verifies the necessary preconditions are satisfied.
2. If validation is successful, Rio processes the request.

If your transaction updates SAPR assets, Rio allows you to begin another activity as soon as it successfully validates your request. You can use any of Rio's features, including creating a new batch or adding another batch of assets, without affecting the transaction you just initiated. The only caveat is that you cannot use any SAPR assets being updated, or select any assets being added, until the transaction completes. These operations can be identified by *Rio Transaction* objects in the sidebar; the assets can be identified by *Locked* icons in their asset cards.

When SAPR is available and moderately or lightly loaded, Steps 1 and 2 above normally complete in rapid succession. If SAPR is heavily loaded or the transaction references many assets, Step 2 may take longer. If SAPR is unavailable, Step 2 lasts until SAPR is available and the transaction is retried or canceled. To allow for possible SAPR processing delays, Rio overlaps SAPR interactions with its own processing so you and other users can continue working with other assets while your transactions are being processed.

To let you know when transactions are subject to possible SAPR loading delays, Rio places a *Rio Transaction* object with a *Busy* icon in the sidebar whenever a transaction requires SAPR access, and leaves it there until it completes.[3] Click the object to see transaction details.

When a transaction completes successfully, Rio replaces the *Busy* icon with a *Success* icon, and then removes the object after 5 seconds.

3 There is a *Rio Transaction* object for every SAPR transaction in progress.

Rio does not initiate error recovery actions on its own. If a transaction fails, Rio replaces the *Busy* icon with a *Failure* icon. The object remains on all sidebars, and all assets referenced by the transaction remain locked, until someone retries or cancels the transaction, as described below.

SAPR batch transaction failure actions

Almost all SAPR batch transactions complete successfully. However, some occasionally fail due to external events or conflicts with other transactions.

If Rio detects an error while validating a transaction, it reports it and returns to the task form. These errors are inherently recoverable; you can either resubmit the transaction (possibly after modifying it) or cancel it. Rio does not place a *Rio Transaction* object in the sidebar for these errors.

If processing of any asset fails after validation, the entire transaction fails. If this happens, Rio:

1. Places a *Failure* icon in the *Rio Transaction* object, as shown here.
2. Reports an error.

Click the *Rio Transaction* object to see a failed transaction view. In these cases, no assets have been updated.

- For *Move Asset* or *Remove Asset*, the associated assets remain locked and the *Rio Transaction* object remains in the sidebar until someone cancels or retries the transaction. You can view the asset's details, add a note, or view its history, but cannot update the asset.
- For *Add Assets*, the *Rio Transaction* object remains in the sidebar until someone cancels or retries the transaction. The assets are not yet in the database, and cannot be found or selected.

If a failed transaction can be retried, it can be cancelled or retried by anyone with the necessary privileges,[4] not just the person who initiated it. This can be done at any time and, if there is more than one, in any order.

If you click **Retry**, Rio moves the assets to your Batch Queue for reprocessing and removes the *Rio Transaction* object from the sidebar. From this point on, the retry transaction is transparent to other users and is only preserved until you initiate reprocessing, cancel it, or exit Rio.

Important: If you exit Rio while the retry is in your Batch Queue, it will be lost and the result will be as if the transaction was never executed.

If the system is slow, you can continue working while waiting for earlier SAPR batch transactions to complete. In an extreme case, you may even have time to initiate two or more transactions. If a transaction fails while you are working on something else, you can either finish what you are doing and deal with the failure later, or interrupt what you are doing and deal it at the time.

How to handle failed SAPR transactions

You may or may not be able to retry a failed transaction.

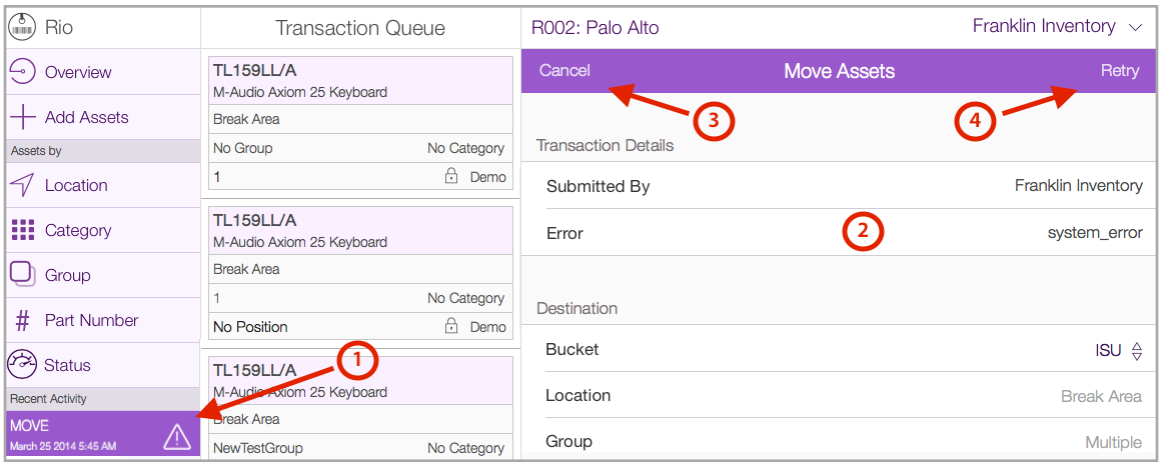
4 For example, if an Inventory Specialist's attempt to remove an SAPR asset fails because SAPR is unavailable, anyone with SAPR access privilege can retry the transaction.

Important: **Do not repeat a failed transaction; instead, retry or cancel it as described below. (Blindly retrying or repeating a transaction that failed due to certain transaction or data conflicts can affect the accuracy of asset data and make some types of errors more difficult to troubleshoot and resolve.)**

- If the failed transaction view has *Cancel* and *Retry* buttons, it can be retried safely. Handle these as described in "*Failed transactions that can be retried*" below.
- If *Cancel* and *Retry* are not present, the transaction cannot be safely retried. Handle these described in "*Failed transactions that cannot be retried*."

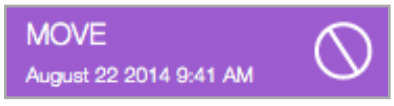
Failed transactions that can be retried

If a failed transaction can be safely retried, there are *Cancel* and *Retry* buttons in the header of the failed transaction view.



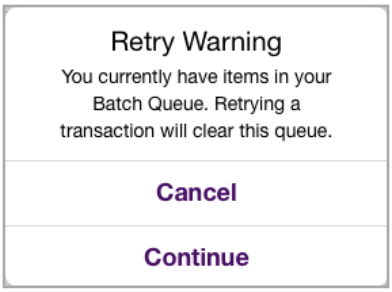
1. Click the *Rio Transaction* object in the sidebar to see the failed transaction view, shown above.
2. Determine the best course of action. Your options are to:
   - Cancel the transaction. You might do this, for example, if the original request was a duplicate of one initiated by someone else, or conditions changed that make it obsolete.
   - Retry the transaction, perhaps after modifying it. You might do this, for example, if the cause of the transaction failure has since been corrected (for example, SAPR was brought online after maintenance).
3. To cancel the retry, click **Cancel**. The effect is as if the transaction was never initiated.

   When you click **Cancel**, Rio places a *Cancelled* icon on the *Rio Transaction* object, as shown here. The object remains in the sidebar until you click another object, when it is removed.



4. To retry, click **Retry**. This moves the transaction to the Batch Queue for editing and resubmission. After copying transaction data, Rio opens the original task form with fields initialized to the same values as for the original transaction.

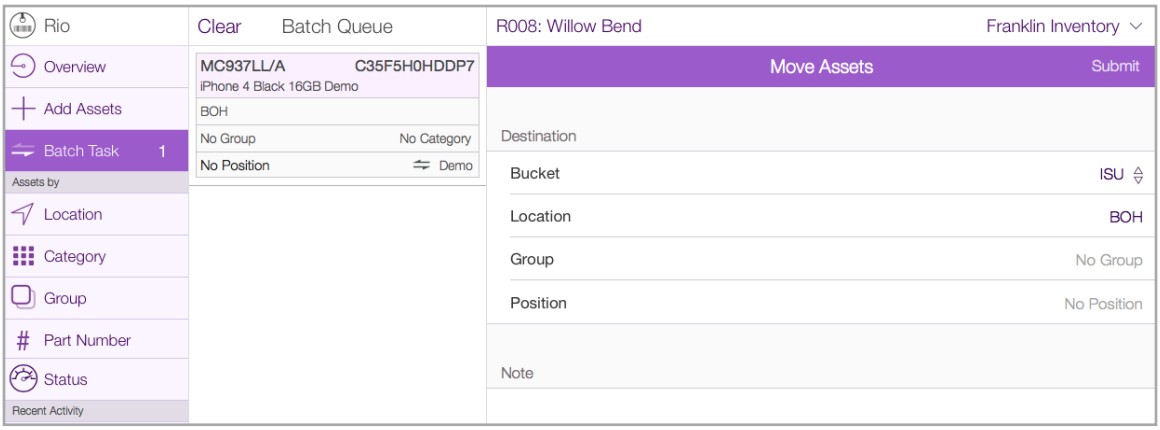
   If you already have assets in the Batch Queue, Rio warns you that the retry operation will clear it as shown here.


Retry Warning
You currently have items in your Batch Queue. Retrying a transaction will clear this queue.
Cancel
Continue

- Click **Cancel** to abandon the retry attempt and return to the failed transaction view.
- Click **Continue** to overwrite asset and transaction information in the Batch Queue for the retry.

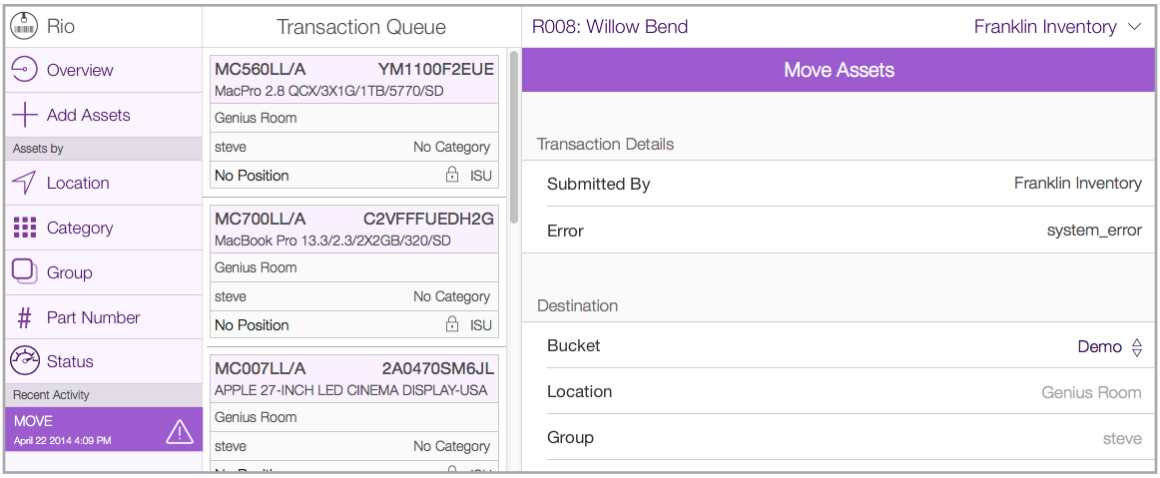
  If you elect to continue, you can make any changes that are allowed in the Batch Queue.

The following figure shows the Batch Queue after *Retry* is clicked for a failed *Move Asset* transaction and the user clicks *Continue* in the warning dialog.



Failed transactions that cannot be retried

If a failed transaction cannot be safely retried, there are no *Cancel* or *Retry* buttons in the failed transaction view.



In this case, all assets referenced by the transaction are locked, and recovery requires data and facilities only available to RFL users. Do not repeat the transaction, and leave the transaction failure state as is; the RFL Inventory Control team monitors for these and pushes them through regularly.

Apple Watch Demo device support

In addition to their normal actions, the following Rio tasks send commands to MDM if the asset is *an Apple Watch Demo* device:

- *Add Assets* - When you add *an Apple Watch Demo* asset to Rio, Rio sends a request to MDM to enroll the device (when the device activates).
- *Remove Assets* - When you remove an *Apple Watch Demo* device, Rio sends a *Brick* command to MDM. This causes the device to reset, and MDM to refuse further activation attempts from the device unless it is subsequently *Unbricked*.

Rio performs all necessary validation before sending a command to MDM. If there is a problem with the request (for example, the serial number is not approved for *an Apple Watch Demo* device, or there are insufficient assets in SAPR to remove a device), Rio reports an error and does not send the command.

If a system problem prevents Rio from delivering the request to MDM, Rio places a *Rio Transaction* object in the sidebar. Click the object to get more information about the error. Contact HelpLine for assistance clearing it.

Once MDM accepts a command from Rio, Rio cannot tell directly whether or when It acts on the command or the command takes effect on the device. However, when you add an *Apple Watch Demo* device to Rio, Rio displays *Awaiting Enrollment* status on its asset card. If there is no *Awaiting Enrollment* status on the asset card, you know the device finished enrolling.

Note: Some MDM commands take effect immediately, but others must wait for the device to connect. For example, *Brick* immediately prevents a device from activating, and *Unbrick* immediately reverses this. However, a *Bricked* or *Wiped* device is not reset until it connects and receives the directive to do so.

Rio tasks

How to execute a task

1. Select one or more assets or build a Batch Queue containing the assets and click **Batch Task**. Both of these methods display an *Asset Details* form that lists available tasks.
2. Click a task to open its form.
3. Fill out the form and click **Submit** to initiate the task, or click **Cancel** to return to the *Asset Details* form.

When Rio begins processing a transaction, it locks all associated assets so they can't be updated while the transaction is in progress. If validation fails, Rio unlocks the assets, reports an error, and returns to the task form.

If validation succeeds, Rio leaves the assets locked until the transaction completes. While locked, they can be selected but cannot be updated or removed by other transactions.[5] When processing ends, Rio unlocks the assets.

5 You can, however, add notes, view asset data and history, and reference the assets in reports while they are locked.

If you initiate the transaction from the Batch Queue, Rio deletes the queue as soon as it successfully validates the request. If you initiate the transaction from selections in the asset list, Rio clears the selections.

Rio handles transactions involving SAPR assets as described in "*Rio's interactions with SAPR*." This includes placing a *Rio Transaction* object with transaction status in the sidebar until the transaction completes.

No completion status is output if the transaction completes successfully. In the event of a transaction failure that doesn't involve SAPR movements, Rio reports the error and places a *Rio Transaction* object in the sidebar. If a transaction involving SAPR assets fails, Rio reports it as described in "*SAPR batch transaction failure actions*." In either case, no asset data is updated in Rio or SAPR.

No tasks have a confirmer and there is no undo.

To see all recent Rio transactions and notes for an asset, use the *View Asset History* task for the asset.

The following tasks are currently defined. Note that some are context-sensitive (for example, are only available for assets in a particular category or state, if a single asset is selected in the asset list, or if the user has a particular privilege). Tasks are only in the *Tasks* list when they are available for you to use.

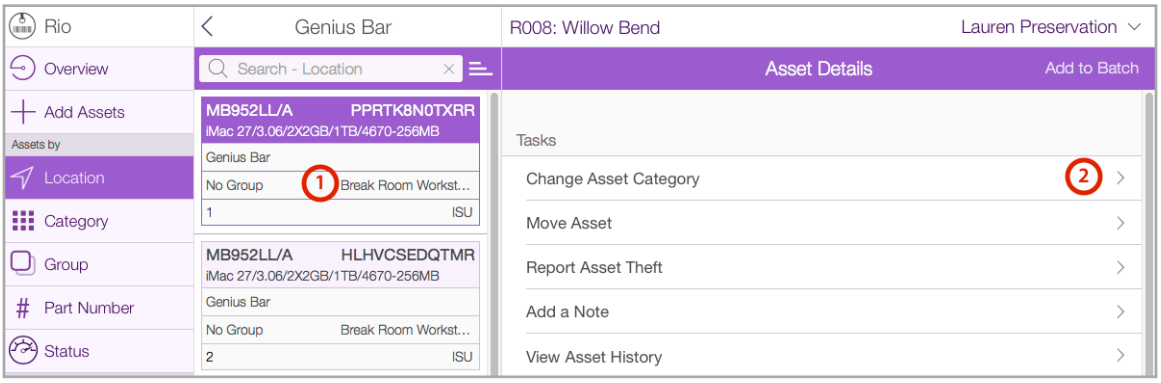
- *Change Asset Category*
- *Move Asset*
- *Remove Asset*
- *Report Asset Theft*
- *Transfer Asset*
- *Add a Note*
- *View Asset History*
- *Modify EasyTrack Device*
- *View EasyTrack History*
- *Register Joint Venture Loaner*
- *Change Joint Venture Loaner State*
- *Unregister Joint Venture Loaner*
- *Assign Serial Number*

How to change an asset's category

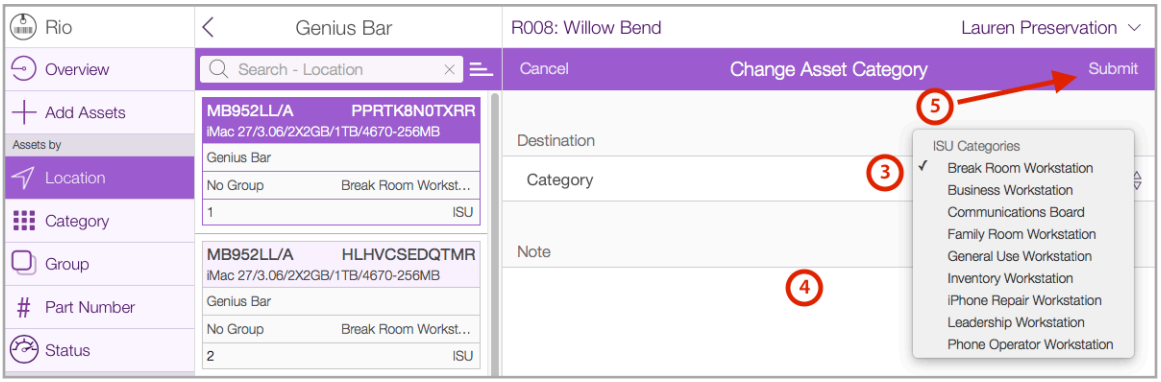
A category is assigned to every SAPR asset when it is added to Rio, as described in "*How to add assets*." The choice of categories depends on its part number; some part numbers are automatically assigned a fixed category, and a narrow set of choices is available for others.

Use the *Change Asset Category* task to change the category for one or more assets for which there are multiple choices. The task is available to Inventory Specialists and EasyTrack Admins for qualified assets when another category is available. SAPR access privileges are not required, and SAPR need not be available.

Note: *Change Asset Category* is not available if the category is fixed, the asset is in an EasyTrack category and is checked out, multiple assets with conflicting category choices are selected, or the asset is registered with Joint Venture.



1. Select one or more assets or put them in the Batch Queue.
2. Click **Change Asset Category**.



3. Click the **Category** selector and select a category. Your choice of categories depends on which assets you select.

   Note: For some articles, you can select a category in either *ISU* or *Demo* in *Add Assets*. For these articles, the only categories available in *Change Asset Category* are ones in the same bucket as the category chosen in *Add Assets*.

4. Optionally enter ***Note***.
5. Click **Submit** to change the category, or click **Cancel** to return to the *Asset Details* form without making any changes.

See "*About categories*" for more information.

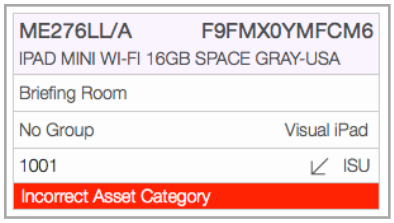
Effect of changing the category for an EasyTrack device

If you reassign the category for an device being tracked by Rio and EasyTrack:

- The device is checked in if it's checked out.
- If the device is an Isaac iPhone or iPod, the device and sled are disassociated.
- The EasyTrack Number is reset.

Because it resets the EasyTrack Number, using *Change Asset Category* inhibits use of EasyTrack Mobile on the device and removes it from EasyTrack Desktop until a new EasyTrack Number is assigned.

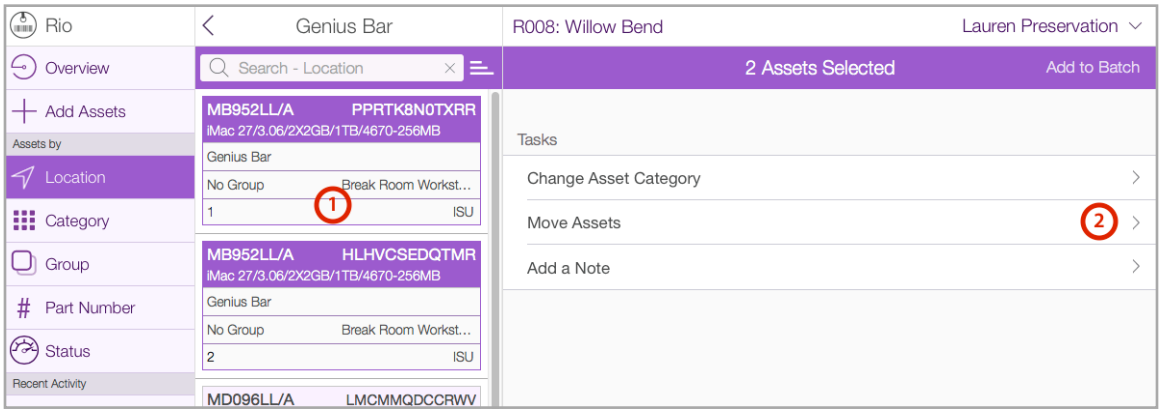
If the device is assigned to a deprecated category, its asset card shows *Incorrect Asset Category* status. Use the *Change Asset Category* task to update the category.



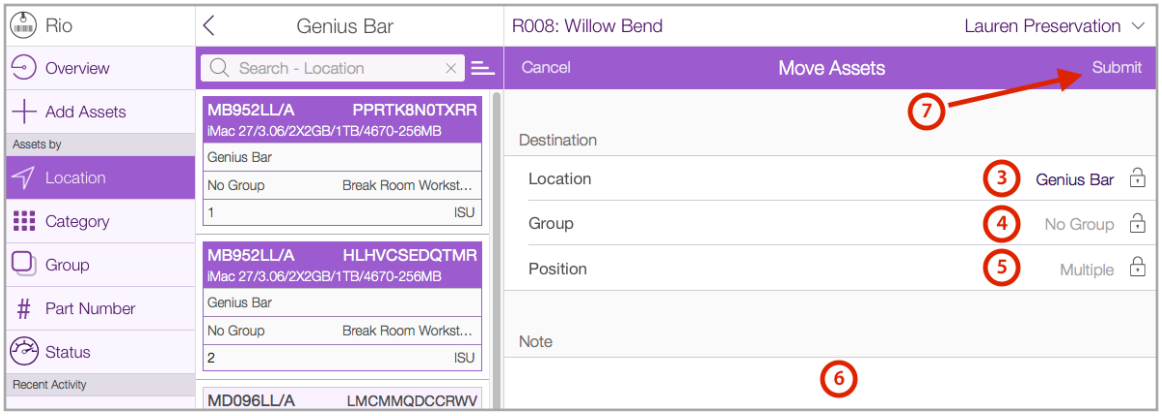
How to move assets

Use the *Move Asset* task to record changes to assets' location, group, and/or position assignments. You update assets in batches, where a batch is one or more assets for which you want some or all of these attributes to have the same values.

Move Asset is available to all users.



1. Select assets in the asset list or put them in the Batch Queue.
2. Click **Move Assets**.



When multiple assets are selected, Rio displays a single value in fields for which all assets have the same value, *Multiple* in fields that have different values, and *No Position* or *No Group* if no value is assigned to any assets.

When two or more assets are selected, fields that can be edited have an *Unlocked* icon , and fields with values that have not been changed have a *Locked* icon . When you click **Submit**, if a field is locked, *Move Assets* preserves the assets' current values. To change the value, click the *Locked* icon to unlock it, then update it. If you leave the field unlocked, *Move Assets* uses the new value. If you lock it again, the current value or *Multiple* is restored and *Move Assets* preserves the current values.

3. **Location** is required. To change it, click the *Location* value to open a menu, select an entry, or start typing to narrow the list. *Locations* that match your string appear at the top of the menu, followed by the others.

   Note: If the value of *Location* is displayed in red font, it's invalid. If you don't change it to a valid location, an error will be reported when you click **Submit**.

4. **Group** is optional. To change it, click the *Group* value to open a menu, select an entry, or start typing to narrow the list. Groups that match your string appear at the top of the menu, followed by the others. If there are no matching groups, Rio uses the name you type and adds it to the menu.

   Note: Rio deletes unused group names. To add one back, enter the complete group name as described above.

5. **Position** is optional and is only present if no assets are assigned to EasyTrack categories. (For EasyTrack devices, Rio uses the *Position* field for the EasyTrack Number.) Type a 1- to 4-character alphanumeric value in the *Position* field.

   - For *ISU* assets, follow a numerical convention matching, for instance, the logical position number or the last octet of the device's IP address.
   - For *Demo* assets, follow the alpha pattern described by Visual Merchandising. For example, front positions are FA, FB, and so on; rear positions are RA, RB, and so on.

6. **Note** is optional. If supplied and multiple assets are selected, the note is added to each.

7. Click **Submit** to make the changes, or click **Cancel** to return to the *Asset Details* form without making any changes.

How to remove assets

Use the *Remove Assets* task to remove one or more assets from Rio. *Remove Assets* is only available if an SAPR asset is selected and you are an Inventory Specialist. If you select multiple assets, they should have the same reason for being removed.

If the asset is in an EasyTrack category:

- Removing it unregisters it from EasyTrack.
- The asset's EasyTrack Number, if any, can be reassigned.
- If the asset is an Isaac device, the sled is disassociated and can be associated with another registered iPhone or iPod.

Assets registered for Joint Venture can only be removed if they are in one of the following loaner states:

- *Ready to Loan*
- *Ready to Refresh*

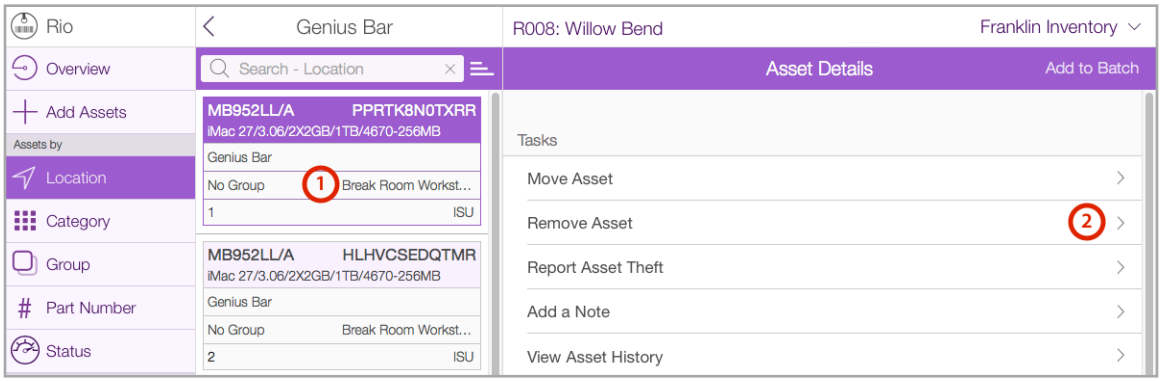
- *Billed to Customer*

Joint Venture assets that are removed are unregistered from Joint Venture.

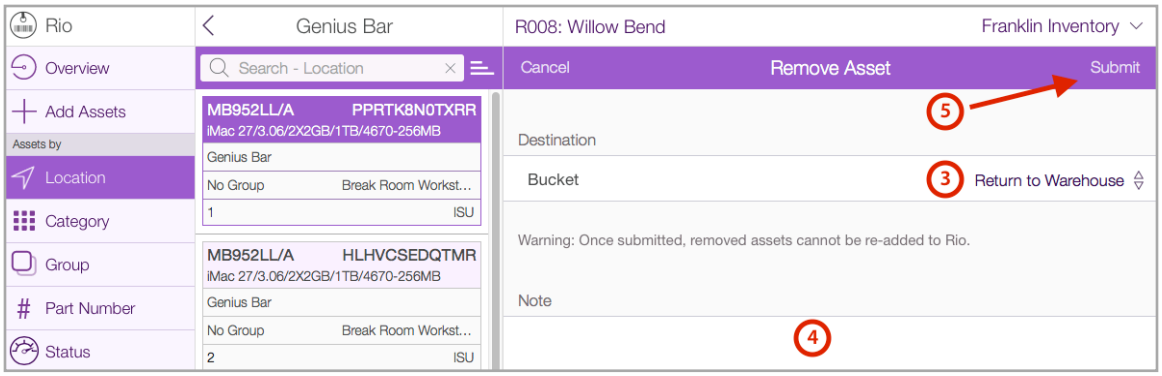
Remove Assets is not present in the *Tasks* list if:

- The loaner state for a Joint Venture asset is *Loaned to Customer*.
- An asset is in IS&T. You must either transfer the asset to a warehouse for deallocation, or contact HelpLine.
- An asset is in ISU or Demo and you are not an Inventory Specialist.
- Assets are in more than one bucket.

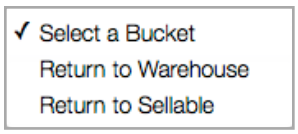
You can only remove assets in Demo or ISU if SAPR is available, and there are at least as many assets in the corresponding bucket in SAPR as you are removing. You cannot remove more than 250 articles at a time.



1. Select one or more assets or put them in the Batch Queue.
2. Click **Remove Asset**.



3. Click the **Bucket** selector and select the destination bucket from the drop-down menu.



   Note: *Apple Watch Demo* devices and assets that have been set up for mobile services, such as Family Room iPads and Isaac devices, can only be returned to the warehouse.

4. Optionally enter **Note**.
5. Click **Submit** to remove the assets, or click **Cancel** to return to the *Asset Details* form without making any changes.

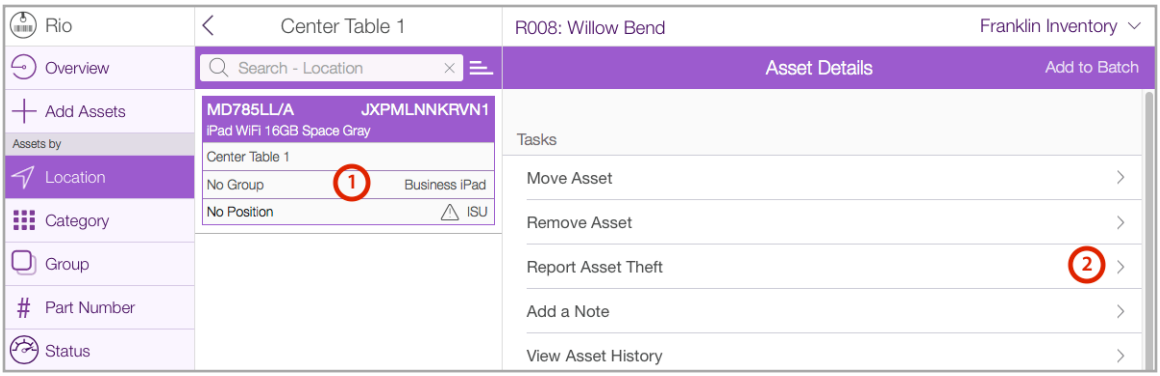
If the asset is an *Apple Watch Demo* device, Rio sends a command to MDM to reset and deactivate the device when you click **Submit**.

Notes:

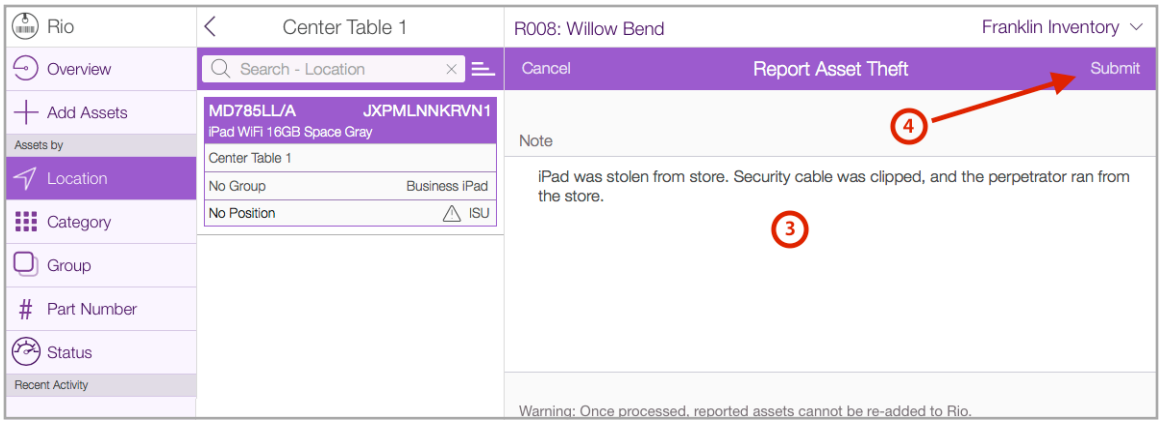
1. You can add a serialized device back to Rio if:
    - It was returned to Sellable, or
    - It is an *Apple Watch Demo* or *iPhone Loaner* that was returned to the warehouse.
    - It is another Apple Watch device (e.g., *Demo Apple Watch Edition*, *Display Table Apple Watch*, or *Try On Case Apple Watch*) that was returned to the warehouse.
2. If you remove an SAPR asset to the warehouse and subsequently add it back, you create a variance that must be corrected with RFL.
3. You cannot add a serialized device back to Rio if:
    - It was reported stolen and removed by RFL, or
    - It was returned to the warehouse and is not an *Apple Watch Demo*, other *Apple Watch* device, or an *iPhone Loaner*.

How to report theft of an SAPR asset

Use the *Report Asset Theft* task to report a stolen SAPR asset. It can only be used when a single SAPR asset is selected. Any user can use the task; SAPR access permission is not required, and SAPR need not be available.



1. Select the asset card for the stolen asset.
2. Select **Report Asset Theft**.



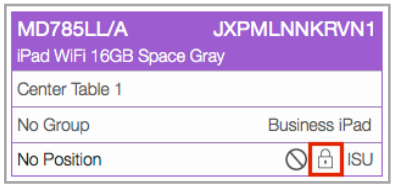
3. Describe the event in **Note**. *Note* is required.
4. Click **Submit** to create a Theft Report, or click **Cancel** to return to the *Asset Details* form without reporting the theft.

When you click **Submit**, Rio locks the asset, creates a Theft Report, and adds *Theft* objects to the sidebars for all users. The *Theft* objects remain until someone cancels the report or RFL processes it.

If the asset is registered with EasyTrack, it is disabled but its category, Easy-Track Number, and check-out state are preserved. If the asset is an Isaac iPhone or iPod that is paired with a sled, the association is preserved. The sled can be disassociated from the iPhone or iPod and a new one associated while it is disabled, but the new association is not reflected in Rio or EasyTrack Desktop until the iPhone or iPod is enabled and EasyTrack Mobile is running and connects again.

Note: If the asset is an EasyTrack device and the Theft Report is subsequently cancelled, the device is unlocked but remains disabled and cannot be checked in or out until it is enabled.

When a theft is reported, your only options are to cancel the Theft Report, or for an RFL employee to process it. Until then, you can add notes to the asset and view its history, but cannot move it, remove it, use any of the Joint Venture or EasyTrack tasks for it, or add it to the Batch Queue. The asset is included in asset counts in the *Overview* view and in reports; is in asset lists when *Location*, *Category*, *Group*, *Part Number*, *Status*, or a *Theft* object is selected; and can be seen in the Batch Queue. When the asset is displayed, it has a *Locked* icon to indicate its status.



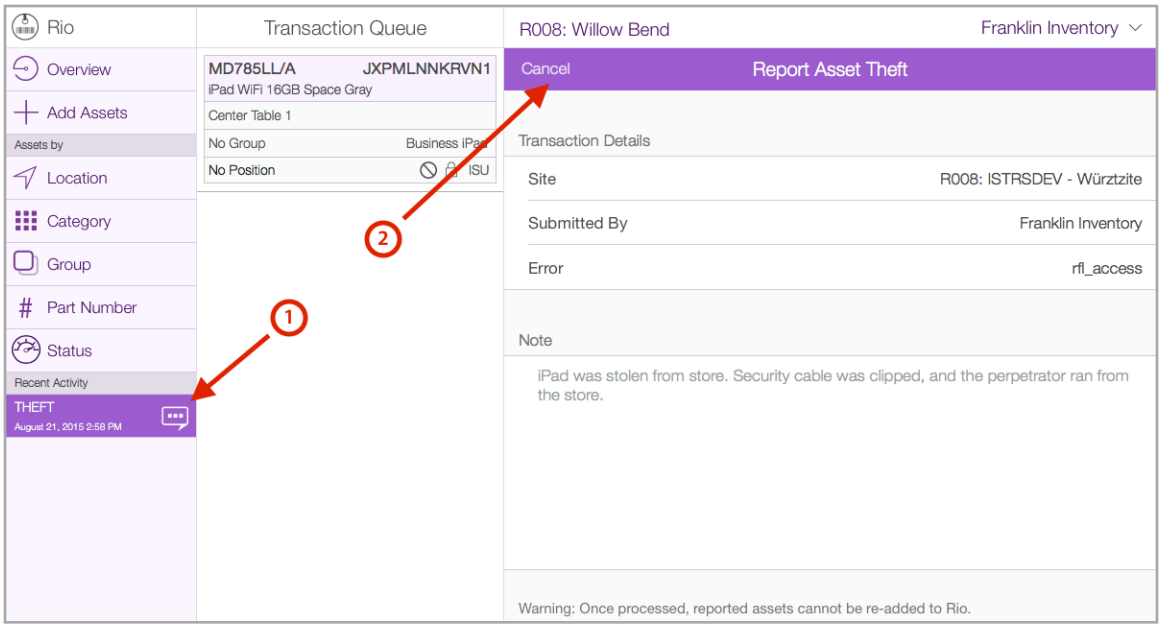
Note: If a sled is missing, assume the standard sled replacement process: open a ticket to have the item removed from Rio, reported as stolen, and replaced.

How to view a Theft Report

Click a *Theft* object in the sidebar to display the Theft Report and the associated asset, as shown in "*How to cancel a Theft Report*" below.

How to cancel a Theft Report

Although Theft Reports can only be created for SAPR assets, SAPR access permission is not required and SAPR need not be available to cancel one.

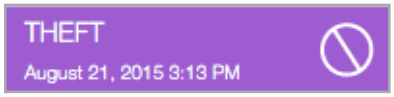


1. Click the **Theft** object.
2. Click **Cancel** to unlock the asset and cancel the report.

Note: If the device is registered with EasyTrack, it remains disabled and cannot be checked out or checked in until it is enabled.

When you click **Cancel**, Rio:

- Unlocks the asset.
- Places a *Cancelled* icon in the *Theft* object as shown here. The *Theft* object is removed from the sidebar when you click another object.



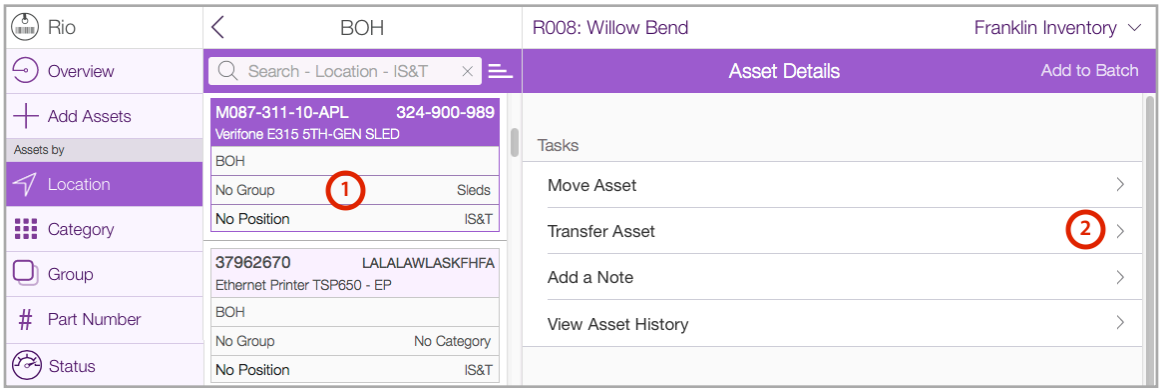
How to transfer data for IS&T assets

Use the *Transfer Assets* task to transfer information about IS&T assets to the warehouse.

Notes:

1. Only BOH Specialists, Inventory Specialists, P&O Specialists, and IS&T Champions can transfer IS&T assets.
2. This is the only way to preserve an asset's history when you transfer it.

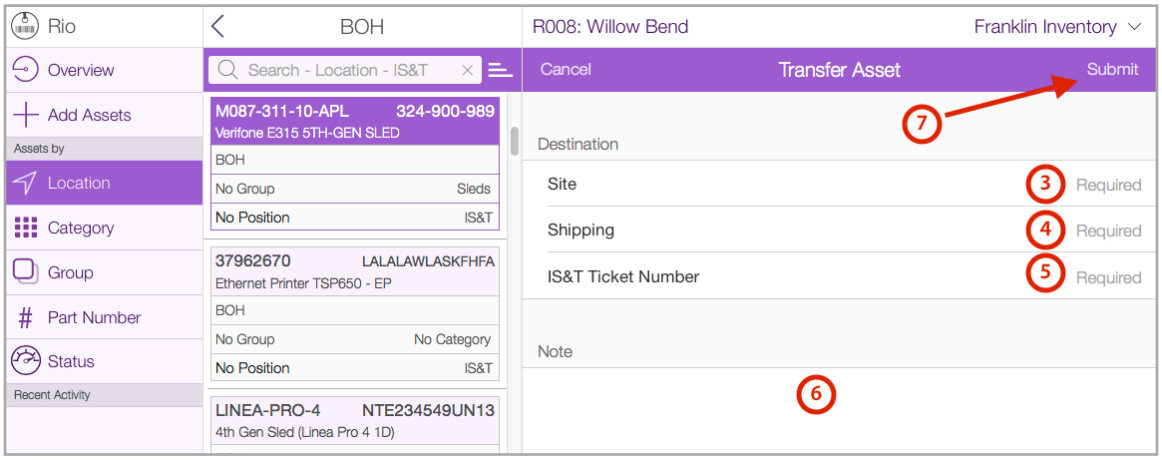
How to transfer asset data



1. Select one or more assets or put them in the Batch Queue.

   Note: When transferring multiple assets, all assets should be in the same shipment and covered by the same ticket.

2. Click **Transfer Asset**.



3. Click the **Site** selector, and select a warehouse from the drop-down menu or begin typing to narrow your choices. Sites that match the string appear at the top of the menu, followed by the others. *Site* is required.

4. Enter the FedEx, DHL, UPS, or other carrier waybill number for **Shipping**. Rio expects the waybill number to be 1-20 characters in length. *Shipping* is required.

5. Enter the ticket number for **IS&T Ticket Number**. Rio expects a 7-8 digit numeric value for Espresso tickets, and 12-digit alphanumeric value for Central Station tickets, where first three characters are INC or PRB, and the remaining nine characters are numeric (e.g., INC123456789). *IS&T Ticket Number* is required.

   Note: The *IS&T Ticket Number* is recorded in Asset History but is not displayed with asset data.

6. Enter details about the condition or status of the assets and/or the reason for their transfer in **Note**.

7. Click **Submit** to transfer asset data to Rio at the warehouse and remove it from your store, or click **Cancel** to return to the *Asset Details* form without transferring the data.

Any number of sleds can be transferred, regardless of their pairing status or the checked-out, checked-in, or enabled or disabled state of their paired iPhones or iPods. Paired sleds are disassociated, with the iPhones or iPods retaining their category, EasyTrack Number, checked-out state, and enabled/disabled status.

If you transfer one or more Verifone and/or iSMP sleds to a warehouse, Rio automatically deprovisions them if either of the following conditions is true:

- The sleds are not already deprovisioned.
- There is no provisioning status for the sleds. (This is the case for sleds added to Rio before Rio was integrated with POS.)

See "*Isaac sled provisioning*" for more information.

Asset attribute settings at receiving site

When an asset is transferred, Rio automatically assigns its location to *In Transit* at the receiving site. When *Location* is selected at the receiving site, the *In Transit* location is listed first and is only present when there is incoming asset data. Rio sets attribute values for transferred assets as follows:

- **Bucket** - Same as at the sending site (*IS&T*)
- **Location** - *In Transit*
- **Group** - The *Shipping* number from the sending site's *Transfer Asset* form
- **Position** - Empty
- **Joint Venture status** - *Unregistered*
- **Category** - Same as at the sending site
- **Asset history** - Same as at the sending site but with *Transfer Asset* added as the last transaction
- **Provisioning status** (Verifone and iSMP sleds only) - Always *Deprovisioned*
- **Blacklisted** (Verifone and iSMP sleds only) - Same as at the sending site

IS&T asset transfer example

The following example illustrates how *Transfer Asset* and the *In Transit* location might be used in an Apple Retail Store when a defective Isaac sled is sent to the warehouse and a replacement returned.

Sending broken Isaac sled to warehouse

1. Contact the HelpLine to report the defective sled and request a replacement. The HelpLine returns a ticket number.
2. Fill out a shipping order.
3. Package the defective sled for shipment.
4. Select the defective sled in Rio and click **Transfer Asset**.
5. Enter the site id of the warehouse, the ticket number, and the tracking number in the *Transfer Asset* form. Enter a note that describes the problem and any other details about the condition or status of the unit, and then click **Submit**.

(When you click **Submit**, Rio removes the unit from your store's inventory.)

6. Ship the unit to the warehouse.

Receiving replacement Isaac sled from warehouse

1. When the replacement asset appears in your store's *In Transit* location, it has all information about it, including its history. (Note that *Group* is set to the shipment's tracking number.)
2. When the package arrives, verify the unit's part number, serial number, and other data agree with the manifest and Rio.

   Note: If a package arrives but data for the asset is not in the *In Transit* location, contact the HelpLine and have the ticket escalated to the Warehouse team to transfer Rio's data.

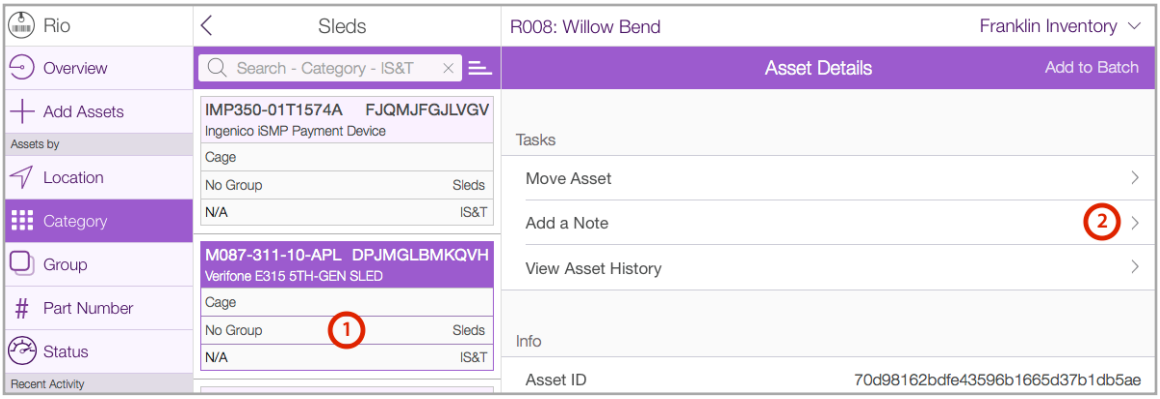
3. Place the asset in the appropriate location in the store, and use *Move Asset* to record its new location and group.

Note: Although IS&T assets are not sellable and not in SAPR, the IS&T and Warehouse teams use Rio to track them. When you receive an IS&T asset, you can expect to receive its data in the *In Transit* location as described above. When you place the unit in inventory, use *Move Asset* to record its new location and group. (If the asset is not in the *In Transit* location and not already in Rio when you receive the unit, contact the HelpLine and have them escalate a ticket to the Warehouse team to transfer Rio's data.)

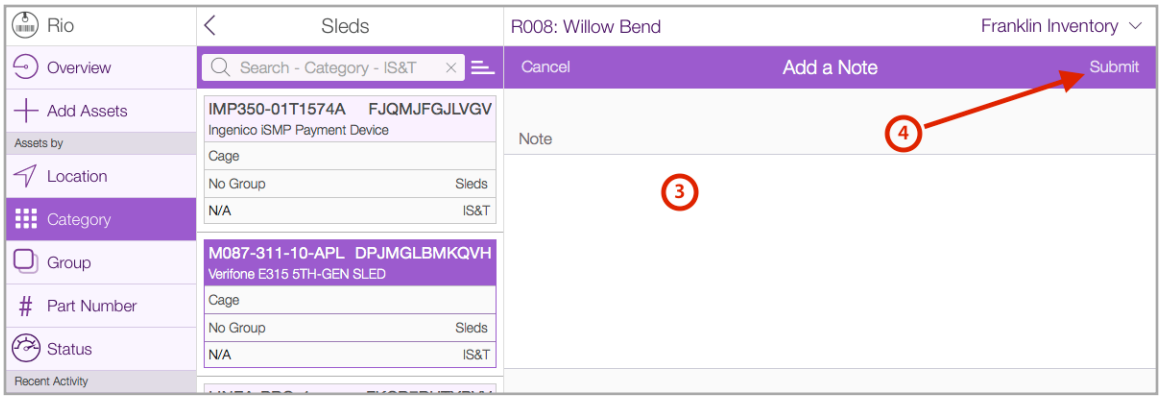
How to add a note

Use the *Add a Note* task to add a note to Asset History for one or more assets. When multiple assets are selected, the same note is added to each. When used with SAPR assets, SAPR access permission is not required and SAPR need not be available. The task is available to everyone.

Note: You can add a note to any asset, including one that is locked.



1. Select one or more assets or place them in the Batch Queue.
2. Click **Add a Note**.



3. Enter **Note**.
4. Click **Submit** to add the note, or click **Cancel** to return to the *Asset Details* form without adding the note.

When you click **Submit**, Rio adds the note to Asset History for each selected asset.

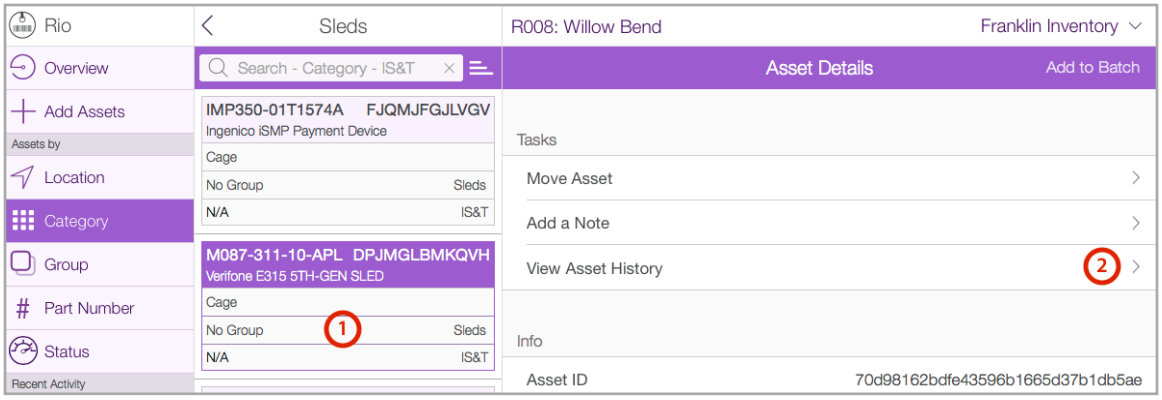
Note: Once entered, notes cannot be edited or deleted.

To view a note, display the asset's history as described below and scroll to the relevant *Added a Note* entry.

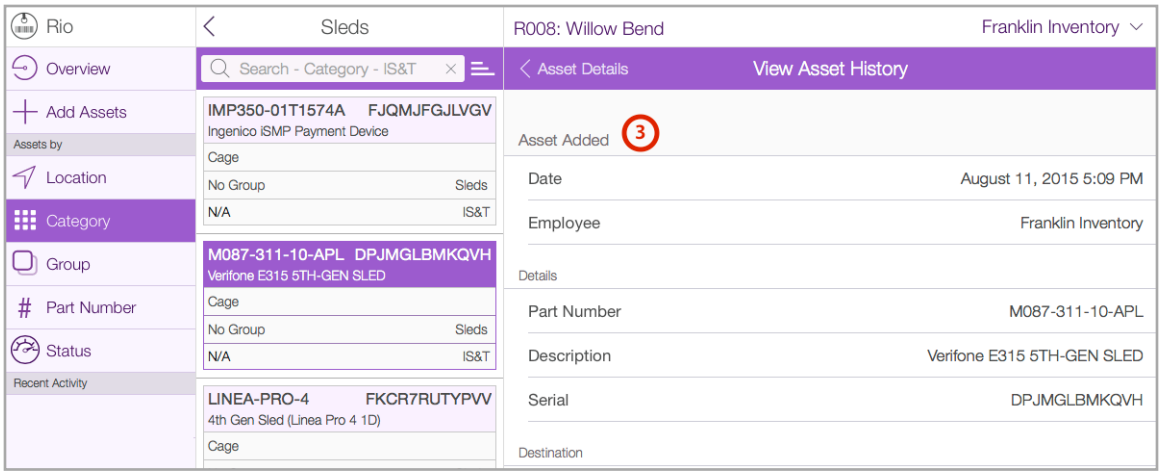
How to view asset history

Use the *View Asset History* task to display transaction history and notes for an asset. The task is only available when a single asset is selected. When used with an SAPR asset, SAPR access permission is not required, and SAPR need not be available. The task is available to everyone.

Note: You can view history for any asset, including one that is locked.



1. Select a single asset card.
2. Click **View Asset History**.



3. Scroll to the item of interest.

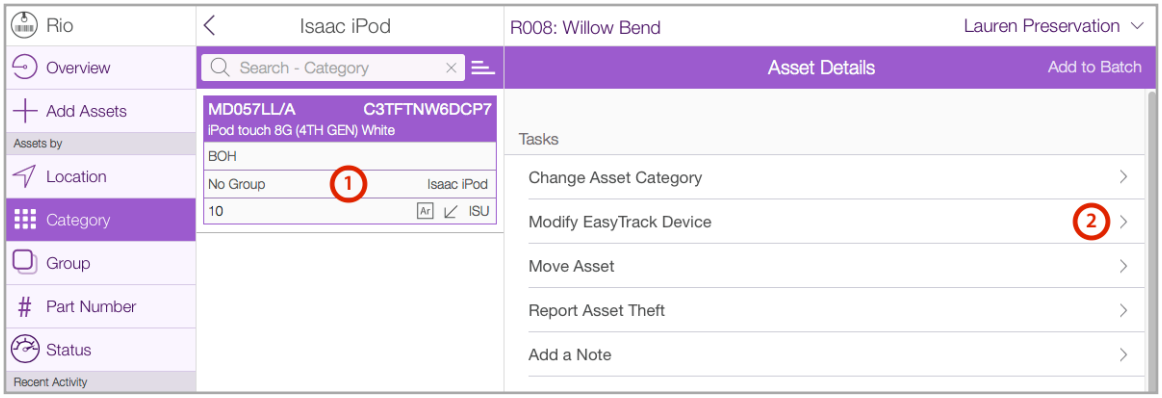
Note: The *View Asset History* task contains all notes and successful update transactions for the asset. Each entry includes the type of transaction, its date and time (in local time), and the user name; other fields are event-specific. The history does not include unsuccessful transactions, *Add a Note*, or any *View History* transactions. It does not include EasyTrack transactions such as check-ins and check-outs; use the *View EasyTrack History* task to see these.

How to register an asset for EasyTrack

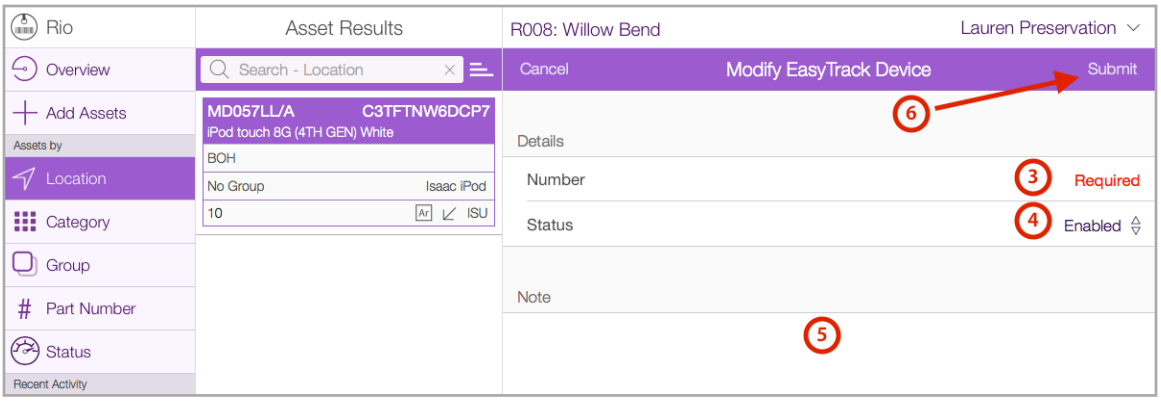
To register an asset for EasyTrack, assign an EasyTrack category when you add it as described for *Add Assets*.

How to enable or disable an EasyTrack device or change its Easy-Track Number

Use the *Modify EasyTrack Device* task to enable or disable an EasyTrack device and/or change its EasyTrack Number. The task is only available to EasyTrack Admins if a single asset is selected, it is registered with EasyTrack, and is not a sled.



1. Select the asset.
2. Click **Modify EasyTrack Device**.



3. Optionally click the **Number** field and enter a number in the range 1-9999. The number must be unique within the asset's category. (*Number* is required if not yet assigned, as in the figure above.)
4. Optionally click the **Status** field and select *Enabled* or *Disabled* from the drop-down menu.
5. Optionally enter **Note**.
6. Click **Submit** to make the change, or click **Cancel** to return to the *Asset Details* form without making any changes.

Disabling a device prevents it from being checked out, checked in, or for EasyTrack Mobile from being used on it. Disabled devices can be enabled, removed or, for Isaac iPhones and iPods, paired with or unpaired from a sled. (If you pair or unpair an Isaac device while EasyTrack Mobile is not running, its pairing status is not updated until EasyTrack Mobile is running again.)

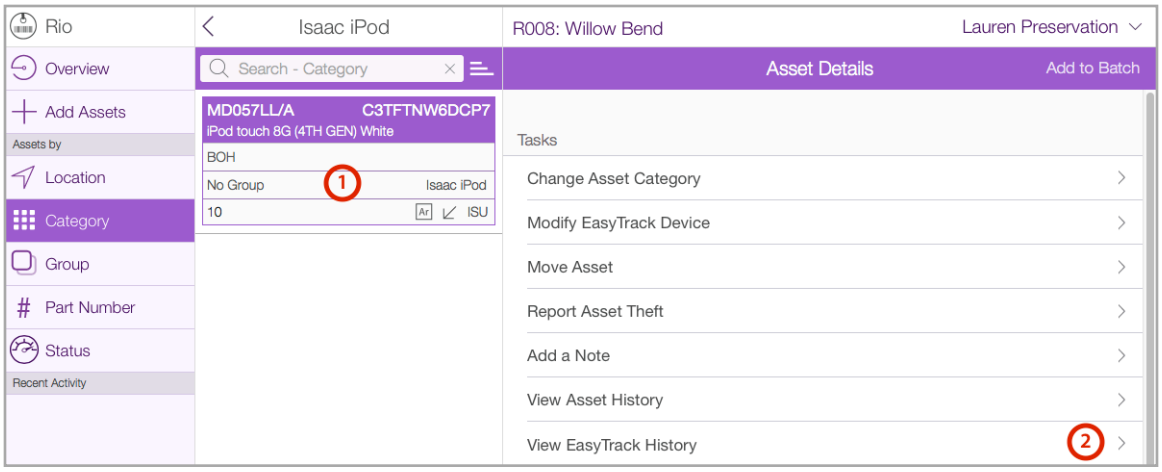
Changing a device's EasyTrack Number does not affect the category it is in, its check-out/check-in state, or its enabled/disabled status. If you change the EasyTrack Number for an Isaac device, the pairing relationship is preserved, and the associated sled inherits the new number.

EasyTrack Desktop only displays registered devices that are enabled and have EasyTrack Numbers. If you disable a device or it does not have an EasyTrack Number, it is not listed.

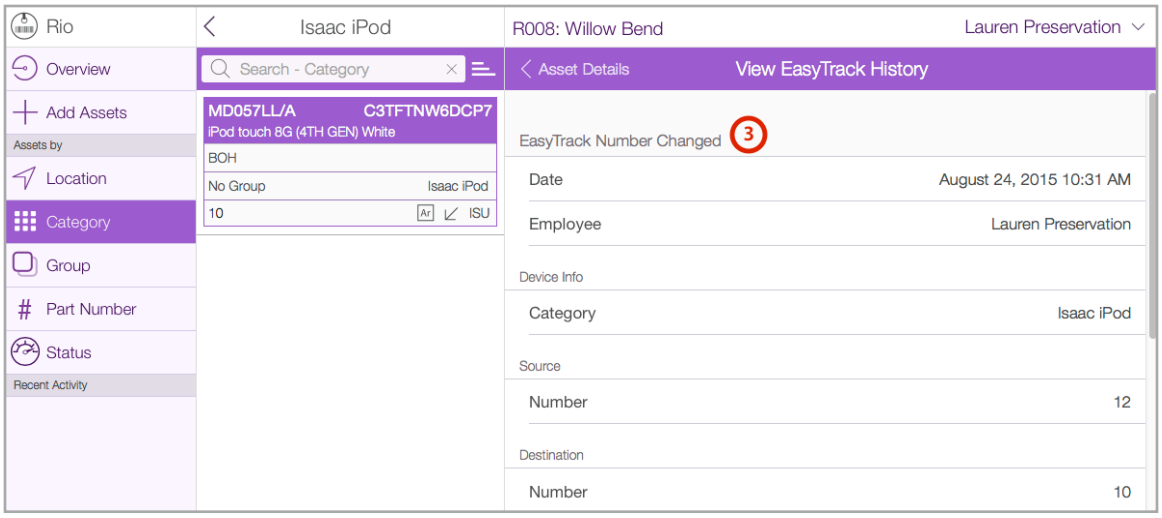
How to view EasyTrack history

Use the *View EasyTrack History* task to display the EasyTrack history for an asset. The task is only available when a single asset is selected that is or has ever been registered with EasyTrack. When used for an SAPR asset, SAPR access permission is not required, and SAPR need not be available. The task is available to all users.

Note: You can view EasyTrack history for any asset, including one that is locked.



1. Select the asset.
2. Click **View EasyTrack History**.



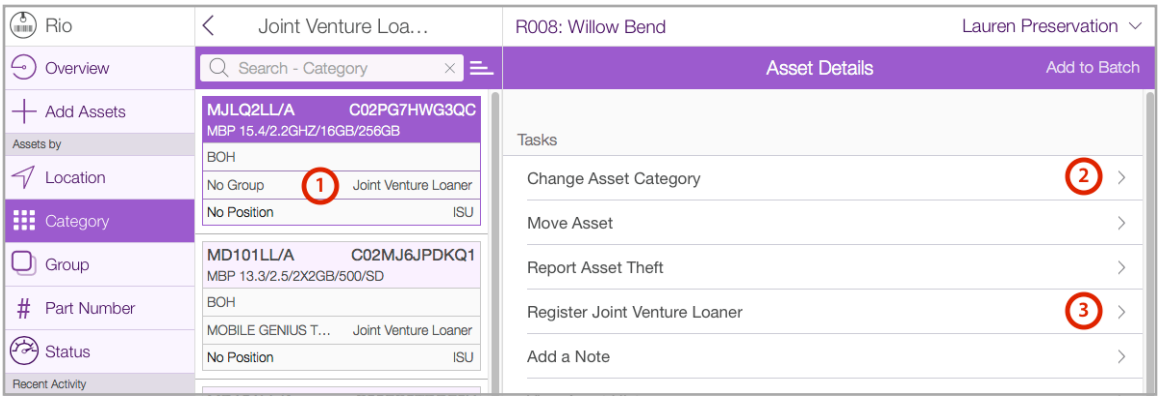
3. Scroll to the item of interest.

Note: EasyTrack History includes all EasyTrack-specific transactions for the asset, including assignments to and from EasyTrack categories, enables, disables, EasyTrack Number changes, check-ins, and check-outs. For Isaac iPhones, iPods, and sleds, the history also includes device pairing events. Each entry includes the type of transaction, the date and time (in local time), and the user name. Other fields are event-specific.

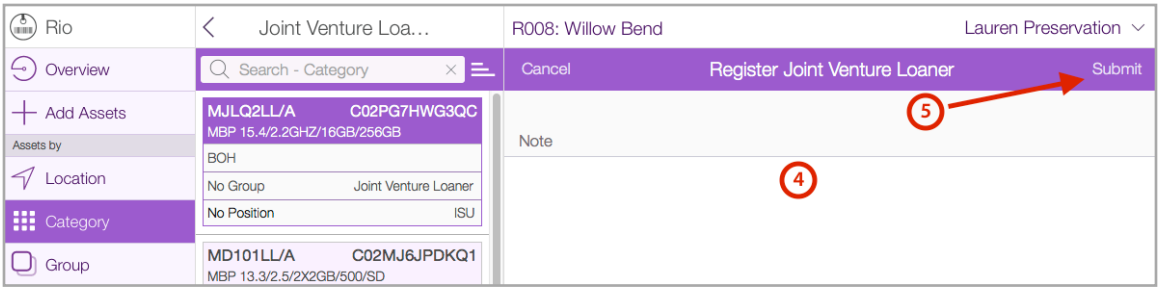
How to manage Joint Venture Loaner assets

How to register an asset for Joint Venture

Use the *Register Joint Venture Loaner* task to register an asset with the Joint Venture program. The task is available to all Store users. A single, Apple-serialized asset in ISU, which is assigned to the *Joint Venture Loaner* category, must be selected. The task is not available for assets in the Batch Queue.



1. Select the asset.
2. If its category is not *Joint Venture Loaner*, use the *Change Asset Category* task to assign it.
3. Click **Register Joint Venture Loaner**.



4. Optionally enter **Note**.
5. Click **Submit** to complete the registration, or click **Cancel** to return to the *Asset Details* form without registering the asset.

The task replaces *Register Joint Venture Loaner* in the *Tasks* list with *Change Joint Venture Loaner State* and *Unregister Joint Venture Loaner*, and initializes the asset's *Joint Venture Loaner* state to *Ready To Refresh*.

Note: To tell whether an asset is registered with Joint Venture, select it. If the *Asset Details* form contains a *Joint Venture Loaner* section, as shown here, it is.

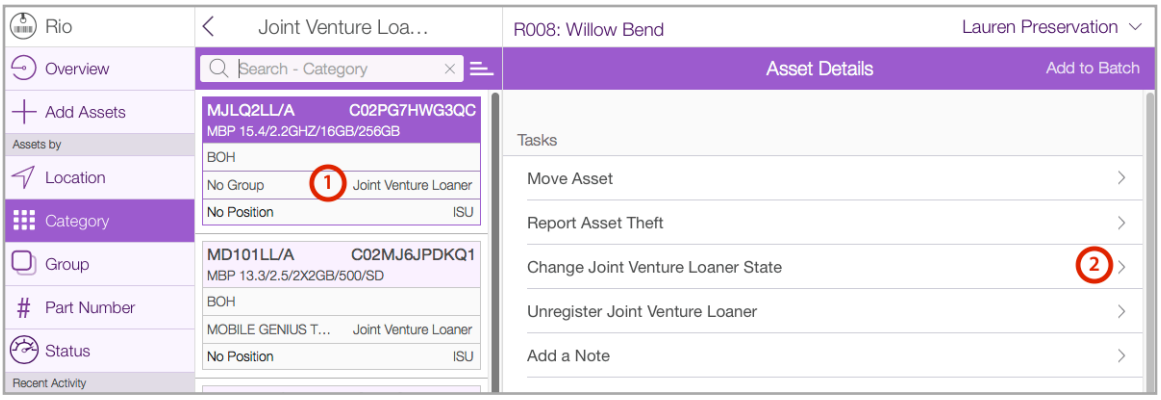
Registering an asset to be a Joint Venture Loaner makes it eligible to be accessed by iRepair so it can be lent to a customer, and makes it ineligible to have its category changed.

Use the *Unregister Joint Venture Loaner* task to cancel the registration.

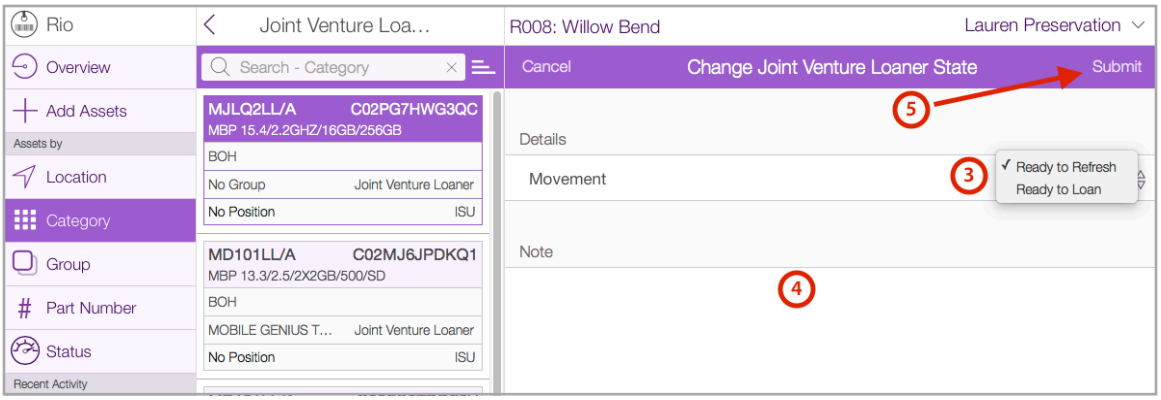
See "*Using Rio for Joint Venture*" for related workflow information.

How to manage Joint Venture states in Rio

Use the *Change Joint Venture Loaner State* task to change an asset's *Joint Venture Loaner* state. The task is available to all users if a single registered Joint Venture asset is selected. The task is not available for assets in the Batch Queue.



1. Select the asset.
2. Click **Change Joint Venture Loaner State**.

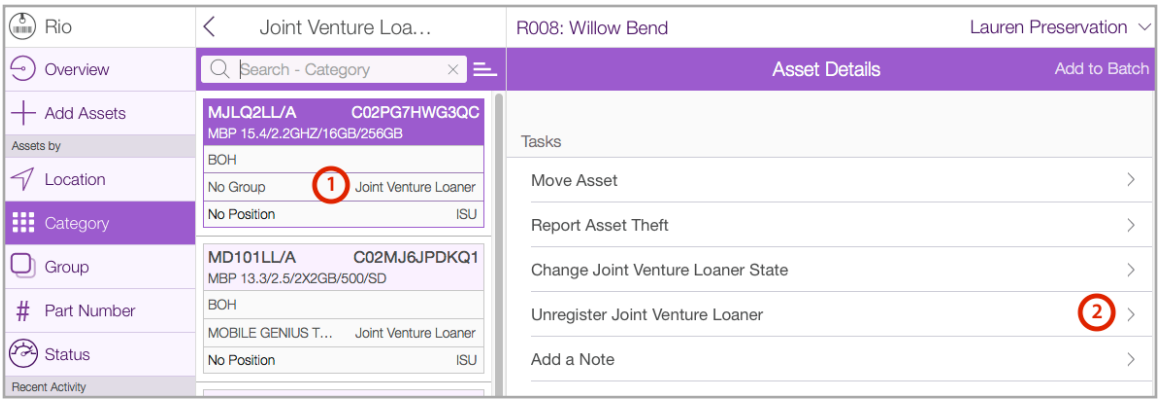


3. Click the **Movement** selector and choose the next loaner state.
4. Optionally enter **Note**.
5. Click **Submit** to update the loaner state, or click **Cancel** to return to the *Asset Details* form without updating it.

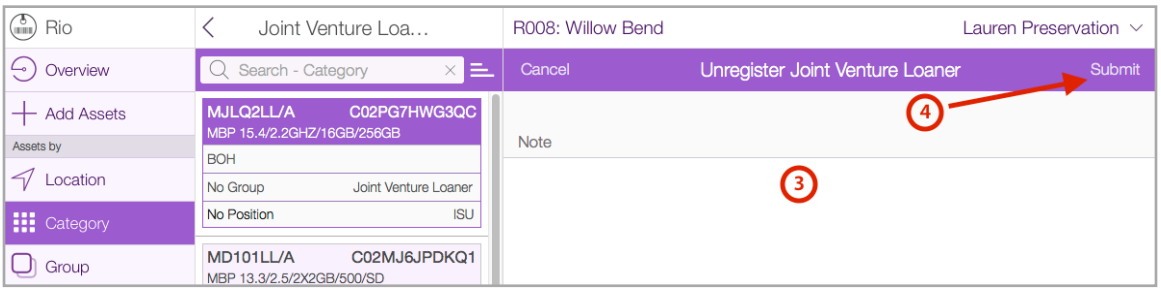
See "*Using Rio for Joint Venture*" for related workflow information.

How to unregister an asset from Joint Venture

Use the *Unregister Joint Venture Loaner* task to cancel an asset's registration with the program. The task is available to all users if a single registered Joint Venture asset is selected. The task is not available for assets in the Batch Queue.



1. Select the asset.
2. Click **Unregister Joint Venture Loaner**.



3. Optionally enter **Note**.
4. Click **Submit** to unregister the asset, or click **Cancel** to return to the *Asset Details* form without unregistering it.

The task replaces *Change Joint Venture Loaner State* and *Unregister Joint Venture Loaner* in the *Tasks* list with *Register Joint Venture Loaner*, and changes the asset's *Joint Venture Loaner* state to *Unregistered*. It also makes the asset eligible to have its category changed.

See "*Using Rio for Joint Venture*" below for related workflow information.

Using Rio for Joint Venture

You use Rio and iRepair in combination to manage the loaner states of assets assigned to the program. You can have as many assets as you need in the program. Only Apple-serialized ISU assets in the *Joint Venture Loaner* category can be used for Joint Venture.

Basic Joint Venture workflow

Here is the basic workflow for any given asset:

1. Use *Change Asset Category* to assign the asset to the *Joint Venture Loaner* category.
2. Use *Register Joint Venture Loaner* to register the asset. This changes its loaner state to *Ready to Refresh*, and makes it eligible to be accessed by iRepair and have its *Joint Venture* state co-managed by Rio and iRepair.
3. Image the asset, then use *Change Joint Venture Loaner State* to mark it as *Ready to Loan*.

4. Lend the asset to a customer, and record the action in iRepair. This changes its loaner state to *Loaned to Customer*.
5. When the customer returns the asset, record the return in iRepair. This changes its loaner state to *Ready to Refresh*. If the customer acquires the asset, record the action in iRepair. This changes its loaner state to *Billed to Customer*.)
6. Repeat steps 3-5 for as long as the asset is in the Joint Venture program.
7. Image the asset, and then use *Unregister Joint Venture Loaner* to unregister it. This changes its loaner state back to *Unregistered*.
8. Optionally use *Change Asset Category* to reassign the asset's category.

Note: If the loaner state is out of sync with iRepair (for example, an asset's return was recorded in iRepair but the loaner state in Rio is *Loaned to Customer*), contact HelpLine.

Joint Venture Loaner state changes

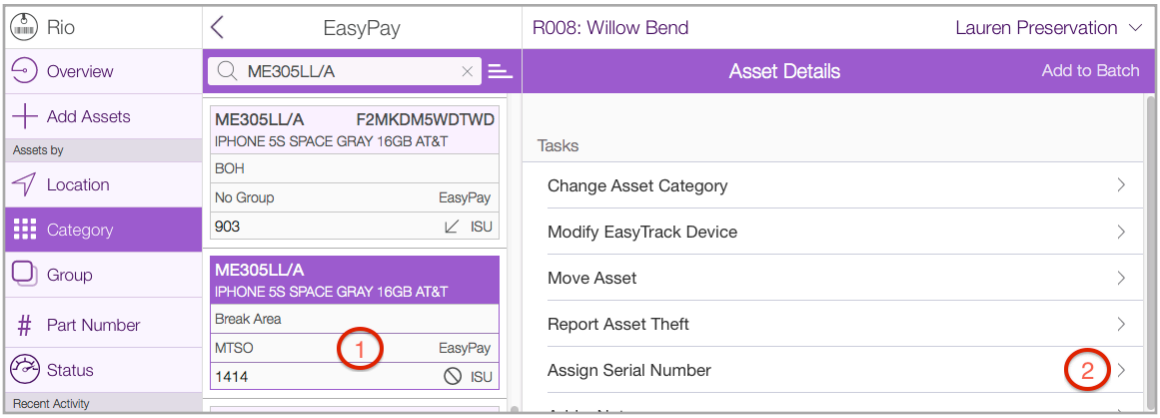
You use the *Change Joint Venture Loaner State* task, in combination with iRepair, to manage the *Joint Venture Loaner* state for assets. The *Movement* field in the task form shows the asset's loaner state. Click it to open a menu and choose the next state.

- If the loaner state is *Ready to Refresh*, your options are to:
  - Click the *Movement* selector, choose *Ready to Loan* in the menu, and click **Submit**. Do this after re-imaging the asset. This makes it eligible to be lent.
  - Use *Unregister Joint Venture Loaner* to unregister the asset. When you do this, consider re-imaging the asset and changing its category before making further use of it.
  - Use *Remove Asset* to remove the asset from Rio. This unregisters it from Joint Venture. After doing this, re-image the asset and return it to the warehouse.
- If the loaner state is *Ready to Loan*, your options are to:
  - Lend the asset to a customer and record the loan in iRepair. This changes the loaner state to *Loaned to Customer*.
  - Click the *Movement* selector, choose *Ready to Refresh* from the menu, and click **Submit**. This indicates the asset is to be re-imaged. (This is unusual.)
  - Use *Unregister Joint Venture Loaner* to unregister the asset. When you do this, consider re-imaging it and changing its category before making further use of it.
  - Use *Remove Asset* to remove the asset. This unregisters it from Joint Venture. After doing this, re-image the asset and return it to the warehouse.
- If the loaner state is *Loaned to Customer*, your options are to:
  - Use iRepair to record return of the asset by the customer. This changes the loaner state to *Ready to Refresh*, and indicates the asset is to be re-imaged.
  - Use iRepair to record sale of the asset to the customer. The changes the loaner state to *Billed to Customer*.

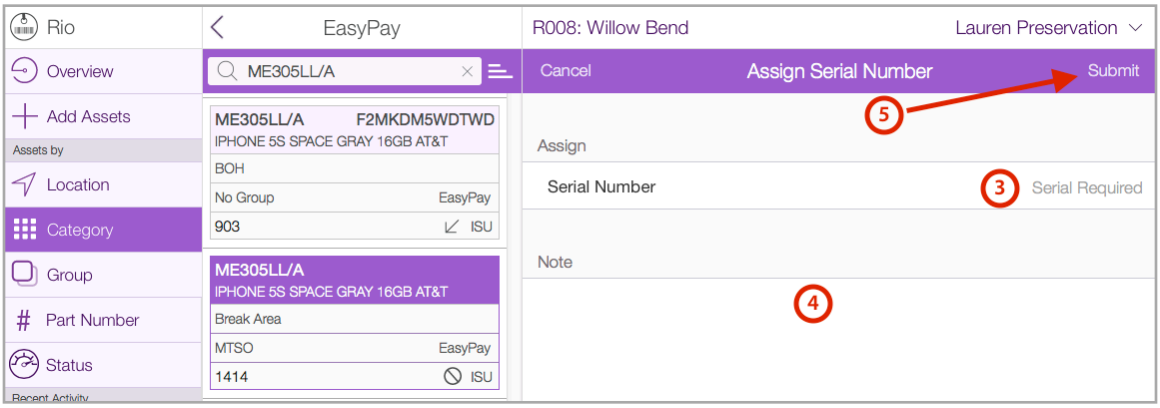
- If the loaner state is *Billed to Customer*, your options are to:
  - Click the *Movement* selector, choose *Ready to Refresh* from the menu, and click **Submit**. This indicates the asset is to be re-imaged. Do this if the customer returns the asset.
  - Use *Remove Asset* to remove the asset and return it to *Sellable*. This unregisters the asset. Do this if the customer acquires it.

How to assign a serial number to an asset

Use the *Assign Serial Number* task to enter the serial number for an asset that does not have one recorded in Rio. The task is only available when a single, serialized asset with no recorded serial number is selected. The task is available to all users.



1. Select the asset.
2. Click **Assign Serial Number**.



3. Click the **Serial Number** field and enter the unique serial number for the asset.
4. Optionally enter **Note**.
5. Click **Submit** to assign the serial number to the asset, or click **Cancel** to return to the *Asset Details* form without assigning a serial number.

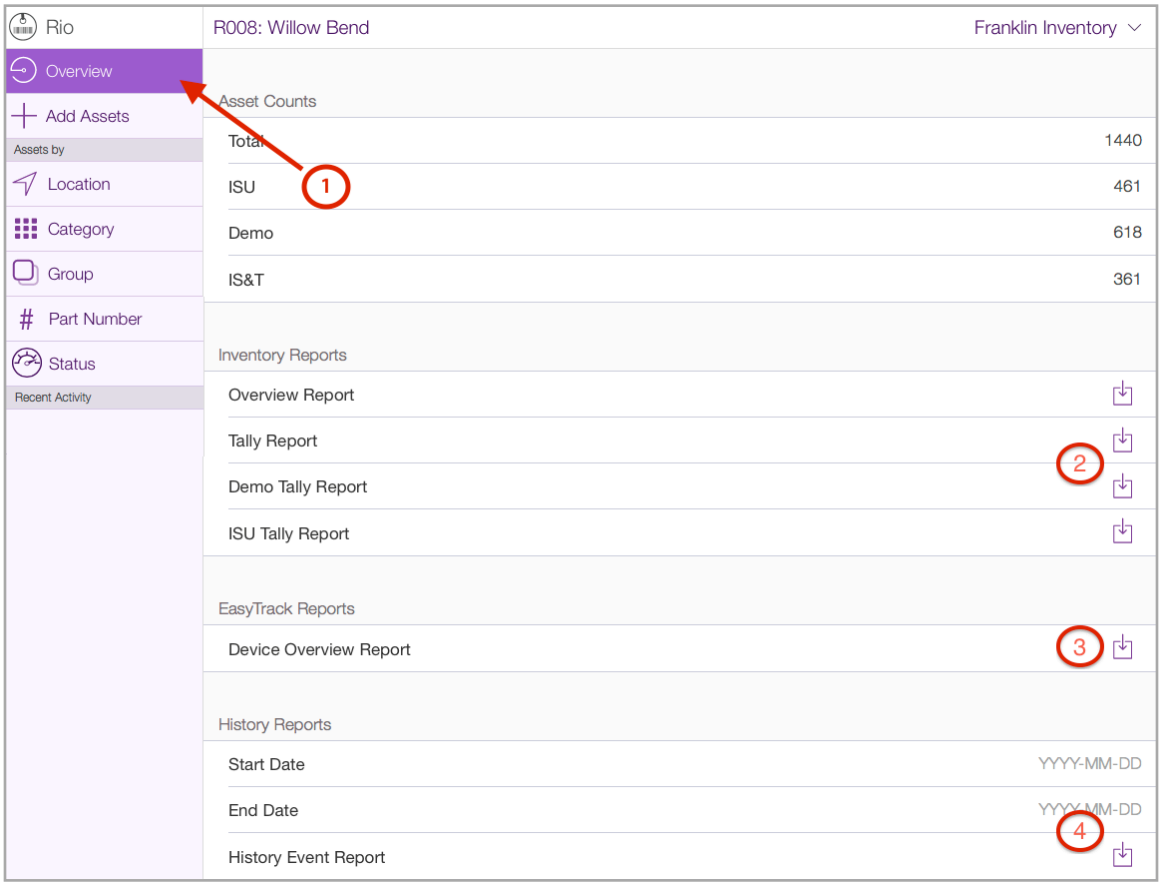
This updates the asset's serial number. If the new serial number is invalid or is a duplicate of one already in the Rio database, Rio reports a validation error.

How to generate reports

Unfiltered versions of the *Overview*, *Tally*, *Demo Tally*, *ISU Tally*, and *History* reports are available to all users. These reports are insensitive to the contents of the *Search* field and Asset Filter. Filtered versions of the *Overview* and *Tally* reports, which only include assets that match the current contents of the *Search* field and Asset Filter, are also available to all users, as is an EasyTrack *Device Overview* report.

Note: These reports include SAPR assets in Demo and ISU, assets that are locked or reported stolen, and assets registered with EasyTrack, Joint Venture, and the iPhone Loaner program. Assets that are being transferred are included if they are in the *In Transit* location. All are output in CSV format and downloaded to your default Downloads folder.

How to generate unfiltered inventory reports



1. Click **Overview**.
2. For an unfiltered *Overview*, *Tally*, *Demo Tally*, or *ISU Tally* report, click the associated selector in the *Inventory Reports* section.

   Note: The unfiltered *Overview* and *Tally* reports contain data for all assets. See "*How to generate filtered inventory reports*" for information about how to generate reports that are filtered by the *Search* field and Asset Filter.

3. Click the **Device Overview Report** selector to get this report.

4. For a *History Event* report, set **Start Date** and **End Date** and click the selector.

   Note: *Start Date* and *End Date* are in GMT; both are required.

Overview report

An *Overview* report contains information about assets by part number.

	A	B	C	D	E	F	G	H	I	J
1	Article	Description	Serial	Category	Bucket	Location	Group	Position	IMEI/MEID	ICCID
114	MD276LL/A	iPhone 4S Black 16GB Verizon	C8PJCT88DTF9		ISU	BOH			99000190001926	
115	MD276LL/A	iPhone 4S Black 16GB Verizon	C8WJGJTRDTF9	Workshop iPhone	ISU	BOH	Red Zone Phones	2	99000190128842	
116	MD377LL/A	iPhone 4S Black 16GB Sprint	C8PJ83R0DTC1	Workshop iPhone	ISU	BOH	Red Zone Phones	3	99000188719679	
117	MD377LL/A	iPhone 4S Black 16GB Sprint	C82J6YFSDTC1	Workshop iPhone	ISU	BOH	Red Zone Phones	4	99000188038492	
118	MC918LL/A	iPhone 4S Black 16GB AT&T	C8PJJ0ZUDT9V		ISU	BOH	Red Zone Phones		013185007441359	89014104255398787648
119	MC918LL/A	iPhone 4S Black 16GB AT&T	C8PJJV75DT9V	Activation iPhone	ISU	BOH	Red Zone Phones		013185003184060	89014104255398690305
120	MC954LL/A	IPAD 2 WI-FI 16GB BLACK	DMPJC484DFHW		Demo	Mac Table 1	Smart Signs	LA		
121	LINEA-PRO-3G	IP 3rd Gen Payment Sled	MSC016746UN10		IS&T	BOH	Easy Pays			
122	LINEA-PRO-3G	IP 3rd Gen Payment Sled	MSC013448UN10		IS&T	BOH	Easy Pays			

If the report is generated from the *Overview* view, it includes all assets. If generated from the *Location*, *Category*, *Group*, *Part Number*, or *Status* view, it only includes assets whose attributes match the search term and Asset Filter, if any.

Tally report

A *Tally* report shows a breakout of assets in each bucket by part number.

	A	B	C	D	E	F
1	Article	Description	Demo	ISU	IS&T	Total
2	37962670	Ethernet Printer TSP650 - EP	0	0	11	11
3	MD277LL/A	iPhone 4S White 16GB Verizon	3	1	0	4
4	661-4412	IPHONE,8GB,REPLACEMENT	0	4	0	4
5	MC920LL/A	iPhone 4S White 16GB AT&T	1	1	0	2
6	MC008LL/A	iPod touch 32GB	0	98	0	98
7	LINEA-PRO-4	4th Gen Sled (Linea Pro 4 1D)	0	0	23	23
8	H9283VC/A	Bowers & Wilkins P3 on-ear hdphns - BLK	1	0	0	1
9	H5988VC/A	Bose - AE2i	2	0	0	2

If the report is generated from the *Overview* view, it includes all assets. If generated from the *Location*, *Category*, *Group*, *Part Number*, or *Status* view, it only includes assets whose attributes match the search term and Asset Filter, if any.

Demo Tally report

A *Demo Tally* report shows counts of *Demo* assets by part number.

	A	B	C	D
1	store	article	description	article_count
2	R008	MD277LL/A	iPhone 4S White 16GB Verizon	3
3	R008	H9283VC/A	Bowers & Wilkins P3 on-ear hdphns - BLK	1
4	R008	H5988VC/A	Bose - AE2i	2
5	R008	H9887ZM/A	Eskuche Control v2 Blue	1
6	R008	MD723LL/A	iPod touch 32GB Black	5
7	R008	MD102LL/A	MBP 13.3/2.9/2X4GB/750/SD	2
8	R008	MC954LL/A	IPAD 2 WI-FI 16GB BLACK	25
9	R008	MC705LL/A	iPad WI-FI 16GB Black	2

ISU Tally report

An *ISU Tally* report shows counts of *ISU* assets by part number.

	A	B	C	D
1	store	article	description	article_count
2	R008	661-4412	IPHONE,8GB,REPLACEMENT	4
3	R008	MC920LL/A	iPhone 4S White 16GB AT&T	1
4	R008	MC008LL/A	iPod touch 32GB	98
5	R008	MC914LL/B	Apple Thunderbolt Display	2
6	R008	MC954LL/A	IPAD 2 WI-FI 16GB BLACK	30
7	R008	ME305LL/A	IPHONE 5S SPACE GRAY 16GB AT&T	24
8	R008	MD276LL/A	iPhone 4S Black 16GB Verizon	3
9	R008	MC544LL/A	iPod touch 32GB (4th Gen)	9
10	R008	MD723LL/A	iPod touch 32GB Black	2
11	R008	ME643LL/A	iPod touch 16GB Black and Silver	1
12	R008	H2268VC/A	Harman Kardon Soundsticks III	38

Device Overview report

A *Device Overview* report (also called an *EasyTrack Overview* report) shows the status of all EasyTrack devices.

	A	B	C	D	E	F	G	H	I	J	K
1	Store	Category	EasyTrack Nu	Primary Part Number	Primary Serial Number	Sled Part Nui	Sled Serial Nu	Status	Current Owner	Last Used Time	Last Used Since
179	R008	EasyPay	1988	ME305LL/A	F2PJPGS6DTWF	N/A	N/A	disabled	None	2014-04-02T16:07:09-07:00	16 days ago
180	R008	EasyPay	3133	ME305LL/A	DR5KV2VDDFJ1	N/A	N/A	checked_out	Leah Market	2014-04-16T10:50:11-07:00	2 days ago
181	R008	EasyPay	9000	MC544LL/A	CCQKV4MQF4K4	N/A	N/A	checked_in	None	2014-04-14T14:37:01-07:00	4 days ago
182	R008	EasyPay	9001	MC547LL/A	C3RDHNCEDCPC	N/A	N/A	checked_in	None	2014-04-14T13:45:15-07:00	4 days ago

History Event report

A *History Event* report contains a history of individual asset transactions made within a specified (GMT) date range. There is a separate row for each transaction for each asset.

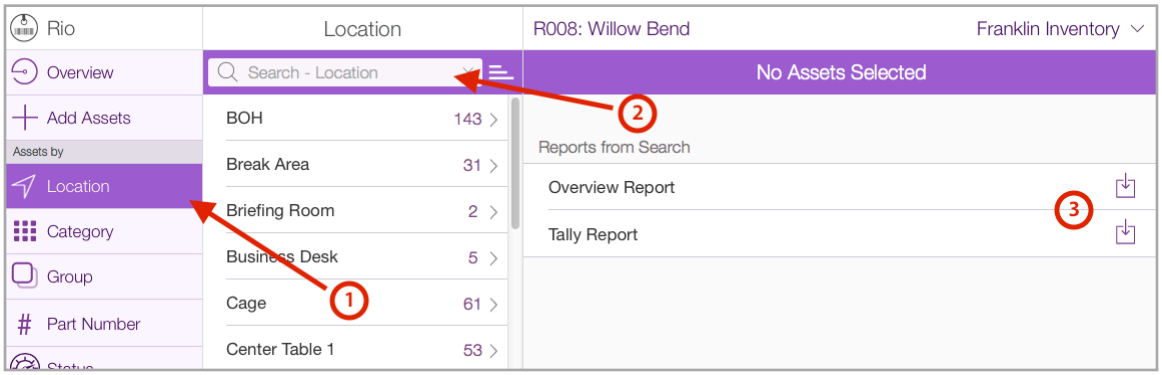
	A	B	C	D	E	F	G	H	I	J	K
1	Event ID	Asset ID	Time (GMT)	Article	Description	Serial	Type	Event	Bucket	Name	Note
2	e3c36830e89521b4e4c0a827ab68634a	e3c36830e89521b4e4c0a827ab683943	2015-08-17T16:18:13Z	MD101LL/A	MBP 13.3/2.5/2X2GB/500/SD	C78JWE8KDPNG	asset	add	isu	Franklin Inventory	
3	e3c36830e89521b4e4c0a827ab6847f8	e3c36830e89521b4e4c0a827ab68297d	2015-08-17T16:18:13Z	MD101LL/A	MBP 13.3/2.5/2X2GB/500/SD	C02JL7SLDRVC	asset	add	isu	Franklin Inventory	
4	e3c36830e89521b4e4c0a827ab68529d	e3c36830e89521b4e4c0a827ab682da8	2015-08-17T16:18:13Z	MD101LL/A	MBP 13.3/2.5/2X2GB/500/SD	C02MJ6JPDKQ1	asset	add	isu	Franklin Inventory	
5	e3c36830e89521b4e4c0a827ab686263	e3c36830e89521b4e4c0a827ab68308d	2015-08-17T16:18:13Z	MD101LL/A	MBP 13.3/2.5/2X2GB/500/SD	C02FC9TDDF8V	asset	add	isu	Franklin Inventory	
6	e3c36830e89521b4e4c0a827ab84691a	e3c36830e89521b4e4c0a827ab846040	2015-08-17T22:38:42Z	MD510LL/A	iPad Wi-Fi 16GB Black	DMPMJP0TF182	asset	add	isu	Franklin Inventory	
7	e3c36830e89521b4e4c0a827ab84afe7	e3c36830e89521b4e4c0a827ab846040	2015-08-17T22:38:58Z	MD510LL/A	iPad Wi-Fi 16GB Black	DMPMJP0TF182	asset	easytrack_modify		Franklin Inventory	
8	e3c36830e89521b4e4c0a827ab85035f	e3c36830e89521b4e4c0a827ab846040	2015-08-17T22:41:04Z	MD510LL/A	iPad Wi-Fi 16GB Black	DMPMJP0TF182	asset	remove	sellable	Franklin Inventory	
9	e3c36830e89521b4e4c0a827ab8be8ca	70d98162bdfe43596b1665d37b60e9e4	2015-08-18T01:47:03Z	MD720LL/A	iPod touch 32GB Silver	7DMGKTFHLPPT	asset	category_change		Franklin Inventory	

Before selecting **History Event Report**, specify the GMT *Start Date* and *End Date* in the *Overview* view if wanted.

All asset transactions in the specified range are reflected in the report. Note that the report only includes transactions that succeeded and none that failed. It does not include *Add a Note* or *View History* transactions, or EasyTrack transactions such as check-ins and check-outs. Dates and times in the report are in GMT.

How to generate filtered inventory reports

The filtered *Overview* or *Tally* reports have the same formats as their counterparts initiated from the *Overview* view, but their contents are filtered by the current settings of the *Search* field and Asset Filter, so they contain the same assets you are displaying.



1. Select **Location**, **Category**, **Group**, **Part Number**, or **Status**.

2. Enter text in the *Search* field and/or select an Asset Filter.
3. Click the **Overview Report** or **Tally Report** selector to generate the report.

If no search term or filter is specified, the contents of the report are the same as for its unfiltered counterpart.

See "*Overview report*" or "*Tally report*" above for descriptions of these reports.

Access Control

Permissions to access selected data and Rio features is controlled through group and job code assignments for user accounts. Individual user accounts may differ, but the capabilities of their roles are typically as summarized in the table below.

Capabilities	Splist	IS&T Champ & P&O Splist	Inv & BOH Splist
Can use Rio, Rio Mobile, Labeler, etc.	X	X	X
Can download mobile apps from Switchboard		X	
Can add IS&T assets to Rio			X
Can Add SAPR assets to Rio			X
Can specify category when adding SAPR assets			X
Can use the *Change Asset Category* task		X	X
Can use the *Modify EasyTrack Device* task		X	
Can check out and check in EasyTrack assets	X	X	X
Can generate *EasyTrack Overview* reports	X	X	X
Can move assets between buckets in SAPR			X
Can transfer IS&T assets		X	X
Can submit Theft Reports	X	X	X

Capabilities	Splist	IS&T Champ & P&O Splist	Inv & BOH Splist
Can remove IS&T assets			
Can remove SAPR assets registered for EasyTrack			X
Can remove other SAPR assets			X
Can register assets for Joint Venture	X	X	X

EasyTrack Administration

EasyTrack Administrators include P&O Specialists and IS&T Champions with *Provision* privilege.

Only EasyTrack Admins can use the *Modify EasyTrack Device* task:

Tasks, options, and behaviors that are specific to EasyTrack Admins are described with the individual tasks. The short summary is that only EasyTrack Admins can:

- Assign an EasyTrack Number to a device.
- Disable an EasyTrack device (to prevent it from being checked out or checked in), and enable it again.

Addenda

About categories

General

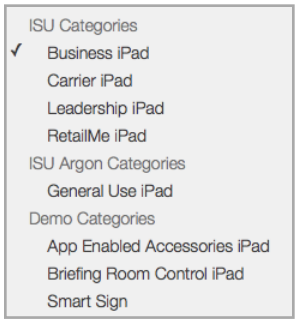
Categories allow Rio and other applications to control how a class of assets is used and managed, and determine which bucket they are in. Categories may be created for specific programs, such as the iPhone Loaner program, or may persist.

Rio assigns a category to every SAPR article added to Rio. The choice of categories is determined by part number. For some, the category is fixed and cannot be changed; for others, there is a narrow range of alternatives. Use *Change Asset Category* to change the category for these after they've been added. Rio's choices for category are closely aligned with the *ISU Management Guide* and *ISU Calculator*. Since article-to-category associations are subject to change, this guide does not list them. Consult the *ISU Management Guide* for clarification, if needed. Rio and this guide assume that you know - at a high-level - how categories are used in your store and what types of articles can be in them. To report an issue, contact the IS&T HelpLine.

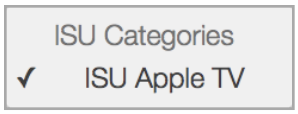
The category selection menus for *Add Assets* and *Change Asset Category* only list categories that are valid for all assets in your selection. If you select a single asset, multiple assets with the same part number, or multiple assets with compatible categories, the range of categories available is widest.

There are two main sets of categories: ISU and Demo. Both are divided into a mix of categories and *collections* of categories that Rio manages in the same way.

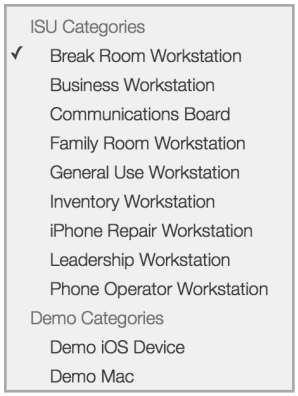
Category selection menus may include choices from more than one collection. In these cases, the collection your choice is in dictates how you can use Rio (and other apps) for the device. For example, this *Add Assets* category selection menu allows you to choose between categories in three collections, two in ISU and one in Demo. As described below, Rio's behavior and the ways you can use the device vary depending on whether the category you choose is in the *ISU categories*, *ISU Argon categories*, or *Demo categories* section in the menu.



For some articles, you can choose between categories within a single collection or, perhaps, a single category. For example, this article's part number limits it to being in the *ISU Apple TV* category.



For other articles, you can choose between categories in *ISU* or *Demo*, illustrated here. The bucket is set automatically based on the category you choose in *Add Assets*. After that, you can only choose among categories in the same bucket. For example, if you choose the *Break Room Workstation* category in *Add Assets*, the bucket is set to *ISU* and only categories in the *ISU Categories* set are available in the *Change Asset Category* task.

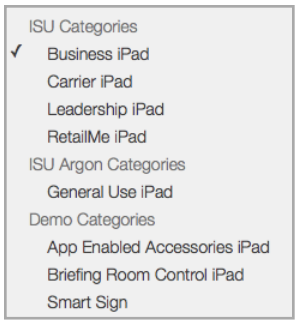


EasyTrack categories

EasyTrack categories are assigned to assets tracked by EasyTrack. An *EasyTrack device* is an asset to which an EasyTrack category is assigned. EasyTrack devices can be in either ISU or Demo.

A subset of EasyTrack categories, called *Argon-enabled categories*, is reserved for EasyTrack devices that can be provisioned to access the Argon network. Devices in *Argon-enabled* categories are expected to have an Argon profile installed. This must currently be done manually, after the device is provisioned.

Not all part numbers, for any given device type, can be assigned to Argon-enabled categories. For example, only some iPad models can be assigned to the *General Use iPad* category, which is Argon-enabled. If a device can be assigned to Argon- and non-Argon-enabled categories, the category selection menus in the *Add Assets* and *Change Asset Category* tasks lists them in separate collections, as shown here.



Note: If multiple assets are selected, Argon-enabled categories are only in the menu if all selected assets are eligible to access Argon.

Suggested EasyTrack Mobile device setup

This section describes the suggested processes for setting up new Isaac iPhones and iPods, and new iPads, for use with EasyTrack Mobile.

Isaac iPhone and iPod setup

The suggested procedure for setting up and activating Isaac iPhones and iPods is described below. For maximum efficiency, we suggest processing the iPhones or iPods in bulk, and processing the sleds in bulk separately, possibly in parallel by different teams.

iPhone/iPod setup

This procedure is independent of sled setup below; the two activities can be done in parallel.

1. A BOH team member pulls a group of 20-50 Isaac iPhones or iPods from inventory.

   Note: There should no SIM cards in the iPhones.

2. The BOH team member uses the *Add Assets* task to add all devices in the group to Rio as follows:

   1. Click **Add Assets** in the sidebar.
   2. Add each device to the Add Queue and supply device-specific information.

      Note: Be sure to enter the IMEI/MEID for an Isaac iPhone correctly. Rio checks to see if it and the serial number match according to manufacturer specifications. If they don't match, the Add will fail.

   3. When all devices are in the Add Queue, set their common properties and add them to Rio.

      - Assign a valid Argon-enabled category for the device. (This automatically sets the bucket to *ISU*.)
      - Set *Location* to *Technology Station*.
      - Use *Group* as desired. For example, set it to a temporary setup group to guide subsequent setup processing.

      If the Add is successful, an Isaac iPhone in the group should show *Awaiting iOS Activation* in the status bar of its asset card.

      If Rio reports an *Activation Policy Failed* error, it means the IMEI/MEID and serial number for one or more iPhones do not match. The transaction items for the affected devices show which iPhones are involved. Verify that the serial number and IMEI/MEID were entered correctly. If so, contact the IS&T HelpLine to deal with the issue.

3. An Operations Specialist activates each device in the group and installs software, as follows:

   1. Turn the device on.
   2. If the device is an iPhone, Rio displays *Awaiting iOS Activation* status on the asset card, and the device displays a *SIM not installed* message. Click **OK** in the device to continue.

      If the start-up sequence succeeds, Rio removes the *Awaiting iOS Activation* status from the asset card. This typically takes only a few seconds but, in rare cases, can take as long as 15 minutes. If an iPhone is not activated within 15 minutes:

1. Erase all content and settings in the device, and then retry the start-up sequence.
2. If the activation attempt fails again, contact the IS&T HelpLine.

3. In Rio, use the *Modify EasyTrack Device* task to assign an EasyTrack Number to the device and enable it for EasyTrack.

   - Assign an EasyTrack Number that is unique within the category.
   - Leave Status set to *Enabled* (the default).

   If the device is an Isaac iPhone and Rio reports a *Device requires activation* error, the iPhone has not been activated. To recover:

   1. Turn the iPhone off and on, and repeat the device startup sequence.
   2. Retry the *Modify EasyTrack Device* operation. If it fails again, contact the IS&T HelpLine.

4. Download and install the Argon profile.

   Note: If Switchboard is not installed, have your Visuals Specialist re-image the device for EasyTrack use.

5. Download and install EasyTrack Mobile through Switchboard.

   Note: See the *EasyTrack User Guide* for how to install and set up EasyTrack Mobile. See the *Rio Mobile User Guide* for how to install and set up Rio Mobile.

6. Download and install other apps as appropriate.
7. Launch EasyTrack Mobile on the device and sign in to verify it has been properly configured in Rio and the device is set up and functioning properly.

   If the device displays a *Profile Installation Failed* error, it most likely has not been set up properly in Rio. Verify that the device is in Rio, it is assigned to a valid Argon-enabled category, an EasyTrack Number is assigned to it, and its Status is *Enabled*. For help, contact an EasyTrack Admin.

   Note: See the "*Handling anomalies*" section of the *EasyTrack User Guide* for other anomalies you may encounter and appropriate actions for each.

   If the login is successful, EasyTrack Mobile displays a *check-out* screen.

8. If the activation and software installation succeed, pair the device with a sled.

Sled setup

The sled setup procedure is independent of iPhone/iPod setup above, and the two activities can be performed in parallel. The procedure begins when a shipment of sleds is received from the warehouse, and assumes all sleds in the shipment are processed together.

A P&O Specialist or IS&T Champion validates the shipment and verifies they are all in Rio with correct data. This, and updating the Rio data for the sleds, can be done most quickly using the following procedure:

1. Find the next sled in Rio. A quick way to do this is to scan the sled's serial number on the box into the *Search* field. A single sled should be found in the *In Transit* location; if not, work with the HelpLine to resolve the issue.
2. Use the *Move Asset* task to change its location and group:

- Change *Location* from *In Transit* to *Technology Station*.
- Optionally change or clear the group.

Note: If the sled is a Verifone or iSMP sled, this provisions it as described in "*Isaac sled provisioning*."

3. Set the sled aside until it is ready to be paired with an iPhone or iPod, below.
4. Repeat these steps for each sled in the shipment.

Sled pairing

This procedure begins when a P&O Specialist or IS&T Champion has one or more activated Isaac iPhones or iPods, and one or more sleds that have been set up and are ready to be paired, as described above.

The P&O Specialist or IS&T Champion logs into Rio, and then repeats the following procedure for each iPhone or iPod in the group.

1. Select the next iPhone or iPod, and find its data in Rio.
2. Check the asset card in Rio to verify:
   - Category is a valid Argon-enabled category for the device.
   - An EasyTrack Number is assigned to the device.
   - The EasyTrack Status is *Enabled* and *Checked-in*.
   - The asset card does not show *Awaiting iOS Activation* or any error status.

   If any of these conditions is not met, work with a BOH Specialist to resolve the issue.
3. Launch the EasyTrack Mobile app on the device and sign in.

   If the login is successful, EasyTrack Mobile displays a *check-out* screen.
4. Physically pair the iPhone or iPod with a sled.

   Note: Rio gets sled and device information from the device; it doesn't matter which sled you select.
5. Verify the pairing is reflected properly in Rio, as follows:[6]
   1. Display the asset card for the iPhone or iPod.
   2. Verify there is a *Paired* icon in the asset card.

      If there is no *Paired* icon, unpair and re-pair the sled. If there is still no *Paired* icon, contact the IS&T HelpLine.
6. Make the Isaac device available for normal check-out and use.
7. Repeat these steps for the next pair of devices.

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6 Alternatively, find the row for the device's category and EasyTrack Number in EasyTrack Desktop. When the device is paired with a sled, an *Attached* sled icon should be present in the row; when unpaired, there should be no *Attached* sled icon.

iPad setup for EasyTrack Mobile

The suggested procedure for setting up EasyTrack iPads is similar to the procedure for setting up Isaac iPhones and iPods, but without the steps required for sleds. It is more efficient to process a group of iPads in bulk than individually, when circumstances permit.

EasyTrack setup

1. A BOH team member pulls a group of 20-50 EasyTrack Mobile iPads from inventory.

   Note: Not all iPads are eligible to run EasyTrack Mobile. See "*About categories*" for more information.

2. The BOH team member uses the *Add Assets* task to add all iPads in the group to Rio as follows:
   1. Click **Add Assets** in the sidebar.
   2. Add each device to the Add Queue and supply its serial number.
   3. When all iPads are in the Add Queue, set their common properties and add them to Rio.
      - Assign an EasyTrack Mobile category for the device. (This automatically sets bucket to *ISU*.)
      - Set *Location* to *Technology Station*.
      - Use *Group* as desired. For example, set it to a temporary setup group to guide subsequent setup processing.
3. An Operations Specialist activates each device in the group and installs software, as follows:
   1. In Rio, use the *Modify EasyTrack Device* task to assign an EasyTrack Number to the device and enable it for EasyTrack.
      - Assign an EasyTrack Number that is unique within the category.
      - Leave Status set to *Enabled* (the default).
   2. Power up the device.
   3. Download and install EasyTrack Mobile through Switchboard.

      Notes:

      1. If Switchboard is not installed, have your Visuals Specialist re-image the device for EasyTrack use.
      2. See the *EasyTrack User Guide* for how to install and set up EasyTrack Mobile.
   4. Download and install other apps as appropriate.
   5. Launch EasyTrack Mobile on the device and sign in to verify it has been properly configured in Rio and the device is set up and functioning properly.

      Note: See the "*Handling anomalies*" section of the *EasyTrack User Guide* for anomalies you may encounter and actions that are appropriate for each.

      If the login is successful, EasyTrack Mobile displays a *check-out* screen.
   6. Repeat these steps for the next iPad.

iPhone Loaner support

Rio provides facilities for assigning Replacement iPhones in support of the *iPhone 5 Sleep/Wake Button Replacement* Program.

Note: The term, *Replacement iPhones*, refers to iPhone service parts identified for the program. Consult program documentation for specific part numbers.

Assumed iPhone Loaner-related procedures

Two significant actions can be taken in Rio for Replacement iPhones:

1. Add them to Rio.
2. Record return of Replacement iPhones by customers.

Add Replacement iPhones to Rio

Use the *Add Assets* task as normal to add Replacement iPhones to Rio. This sets their category to *iPhone Loaner* and their bucket to *ISU,* sets their *Loaner iPhone State* to *Available*, and moves them from Sellable to ISU in SAPR. For efficiency, the suggested procedure is to add them at the same time.

1. Click **Add Assets** in the sidebar.
2. Add them all to the Add Queue and specify their serial numbers and other device-specific information as necessary.
3. Set their common properties, and click **Submit**.
    - *Category* is automatically assigned to *iPhone Loaner*.
    - *Bucket* is automatically assigned to *ISU*.
    - Assign *Location*, *Group*, and *Position* as appropriate.

When data for a Replacement iPhone is displayed, its *Asset Details* form has an *iPhone Loaner* panel that includes its *Loaner iPhone State*. If *Loaner iPhone State* is *Loaned*, the panel also includes date and time it was lent and the Repair ID.

Return Replacement iPhones

This procedure assumes the customer has returned the Replacement iPhone, and a BOH team member has received the device and an associated reversal request.

1. Find and select the Replacement iPhone's data in Rio based on its serial number.
2. Select the *Remove Asset* task.
3. Select *Return to Warehouse* for bucket.
4. Click **Submit** to remove the asset from Rio and SAPR.
5. RTW the device according to program guidelines.

Apple Watch Demo device support

Rio handles *Apple Watch Demo* devices a little differently than other SAPR assets in the following main ways:

- All *Apple Watch Demo* devices are enrolled in MDM by Rio. Rio sends an enrollment request to MDM when you add a device with *an Apple Watch Demo* part number. If the serial number is not approved, *Add Assets* fails.
- When you add *an Apple Watch Demo* device, Rio assigns the category and bucket, and neither can be changed. When you select it, the asset card has an *Awaiting Enrollment* status until the device is turned on and completes its enrollment.
- The *Remove Asset* task automatically sends a *Brick* command to MDM if you remove *an Apple Watch Demo* device. This resets and deactivates the device and prevents it from being activated again unless it is *Unbricked*.
- The *Report Asset Theft* task does not do this. However, Rio sends a *Brick* command to MDM if an RFL user removes the device when the theft report is processed.

Reservation Pass iPhone support

Rio provides special facilities for administering Red Zone iPhones that are used outside the store and tracked by EasyTrack. These devices are handled like other EasyTrack iPhones with the following caveats:

- Reservation Pass iPhones are service parts with special part numbers.
- You use *Add Assets* as normal to add these devices to Rio. Rio automatically sets their category to *Reservation Pass iPhone* and bucket to *ISU* when you add them (based on their part numbers). You cannot change these assignments, and cannot assign the *Reservation Pass iPhone* category to any other articles.
- The *Change Asset Category* task is not in the Tasks list when you select these assets, and you cannot use these devices for Joint Venture or as iPhone Loaners.
- These iPhones cannot be provisioned for the Argon network. However, you can use *Modify EasyTrack Device* to assign EasyTrack Numbers to them, and track them with EasyTrack, as normal. You check them out and with EasyTrack Mobile through the Apple network.

Isaac sled provisioning

Isaac (Verifone and iSMP) sleds must be provisioned for the stores in which they are used by the EasyPay app. Rio automatically provisions them when you add them to a store's inventory or move them out of the *In Transit* location, and deprovisions them when you remove or transfer them.

Synchronizing with POS

Rio notifies POS whenever an *Add Assets*, *Move Assets*, *Transfer Assets*, or *Remove Assets* task changes the *Sled Provisioning* status of an Isaac sled. These notifications are typically sent after other transaction processing has completed.

Rio can take the following POS-related actions for Isaac sleds:

- *Provision* - When Rio provisions a sled, it sends a *Provision* request to POS. This allows the sled to be used by EasyPay in the current store. The *Add Asset* and *Move Asset* tasks provision an Isaac sled automatically.
- *Deprovision* - When Rio deprovisions a sled, it sends a *Deprovision* request to POS. This prevents the sled from being used by EasyPay. The *Transfer Asset* and *Remove Asset* tasks deprovision an Isaac sled automatically.

If you update multiple Isaac sleds in the same transaction (for example, you move multiple Verifone and/or iSMP sleds out of *In Transit*), Rio sends a separate request to POS for each one. If any of those POS requests fail, a single *Rio Transaction* object is added to the sidebar and the *Sled Provisioning* status for the affected assets is not updated in either POS or Rio, but the transaction may otherwise complete successfully. Contact HelpLine for assistance clearing these errors.

Recording sled provisioning events in Asset History

Rio records a *Reprovisioned EasyPay Sled* event in a sled's Asset History whenever it provisions or deprovisions the device.

Add Assets handling for Isaac sleds

When a Verifone or iSMP sled is added to a store, Rio sends a *Provision* request to POS.

Move Assets handling for Isaac sleds

Rio automatically provisions a deprovisioned Verifone or iSMP sled if you move it to a valid location in a store. Sleds that are already provisioned are not provisioned.

If a Verifone or iSMP sled was added to Rio before Rio was integrated with POS, Rio automatically provisions it if you change its location or group.

Transfer Assets handling for Isaac sleds

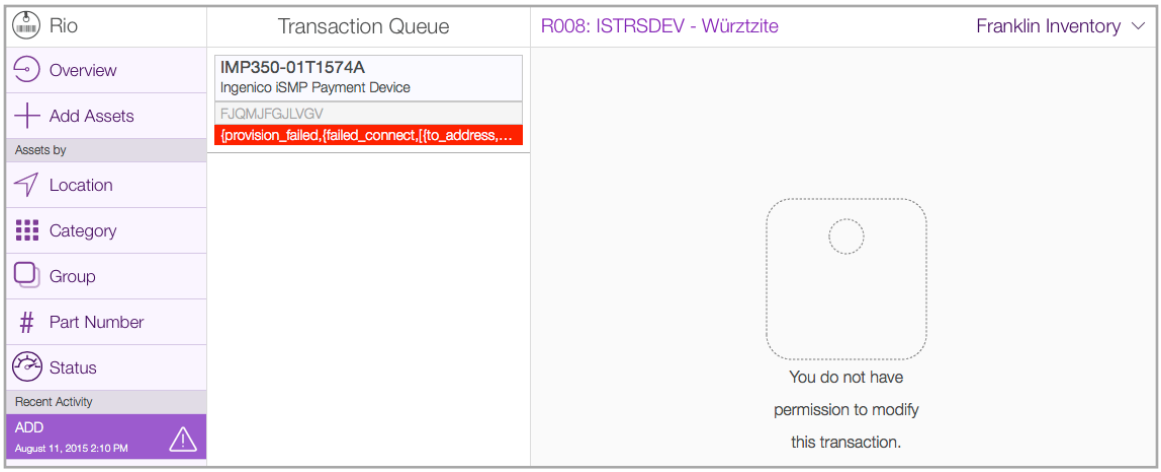
Rio automatically deprovisions a provisioned Verifone or iSMP sled that you transfer to a warehouse. Sleds that are already deprovisioned are not deprovisioned.

Verifone and iSMP sleds are deprovisioned when you receive them from a warehouse, but are automatically provisioned when you move them out of *In Transit*.

If a Verifone or iSMP sled was added to Rio before Rio was integrated with POS, Rio automatically deprovisions it if you transfer it from a valid location in a store, but not if you transfer it from the *In Transit* location.

Handling provisioning errors for Isaac sleds

If Rio is unable to communicate with POS, it typically reports the error after normal task processing completes by placing a *Rio Transaction* object with a *Failure* icon on the sidebar. If you click the object, the view is as shown below.



Terminology

These terms are used in this document.

- *Brick* - A mechanism for preventing a device from connecting to a managed network. For Rio, *bricking* a device generally includes wiping (erasing) it if/when it connects, as well as preventing it from enrolling with managed networks.
- *EasyTrack category* - A category assigned to devices whose possession is tracked by Rio and EasyTrack. Devices in these categories are checked out and checked in.
- *EasyTrack device - A* device to which an EasyTrack category is assigned.
- *EasyTrack Desktop* - A web interface for viewing the status of *EasyTrack* devices in the store.
- *EasyTrack Kiosk* - Another name for EasyTrack Desktop.
- *EasyTrack Mobile* - An iOS app that is used to check out and check in a mobile device from itself.
- *EasyTrack Mobile category* - A category assigned to assets on which EasyTrack Mobile is run.
- *EasyTrack Mobile device - A* device in an *EasyTrack Mobile* category that has EasyTrack Mobile installed. *EasyTrack Mobile* devices must be checked out and checked in from the device.
- *EasyTrack status* - The assignment status of an *EasyTrack* device, and is *Checked Out* or *Checked In*. A *Disabled* device cannot be checked out or checked in until it is *Enabled*.
- *Isaac sled* - A Verifone or ISMP sled.
- *Isaac sled provisioning* - Registering a Verifone or iSMP sled with POS for EasyPay use in the store. Isaac sleds are provisioned when they're moved out of the *In Transit* location after being transferred to a store, and are deprovisioned when they're removed from the store.
- *Inventory Specialist* - In this document, a BOH Specialist or Inventory Specialist.
- *Operations Specialist* - In this document, a P&O Specialist or IS&T Champion.
- *Provision* - For iOS devices, to download and install network and device profiles and software on the device. For Isaac sleds, to authorize the device for use by EasyPay in a store (in POS).

- *SAPR asset* - A finished goods asset that is being used in a store, and managed and tracked in the *ISU* or *Demo* bucket in both Rio and SAPR.
- *SAPR transaction* - A transaction that accesses or updates article data in Rio and SAPR for assets in ISU or Demo.
- *Store user* - Any user who is assigned to an Apple Retail Store. This includes Specialists, BOH Specialists, Inventory Specialists, P&O Specialists, IS&T Champions, Managers, and other users who are assigned to individual stores.
- *Unbrick* - A mechanism for reversing the effects of *bricking* a device; i.e., to allow it to enroll with managed networks. If the device was wiped, it must be reprovisioned before it can be used.
- *Wipe* - To erase all applications, application data, profiles, and settings from a device. The device must be reprovisioned before it can be used.

For more information

- Rio Release Notes - http://rio.corp.apple.com/help/release-notes
- Rio Quick Start Guide - http://rio.corp.apple.com/help/quickstart
- Rio User Guide for Store users (this guide) - http://rio.corp.apple.com/help/user-guide
- Rio User Guide for RFL, Market Support, and Warehouse Users - http://rio.corp.apple.com/help/support-guide
- Rio Mobile User Guide - http://rio.corp.apple.com/help/mobile
- EasyTrack User guide - http://easytrack.corp.apple.com/help

Support

To report an issue, contact the IS&T HelpLine.